

What to do When a Loved One Dies: A Checklist for Survivors

Amundsen Davis Estate Planning Alert
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When someone dies, people face the overwhelming task of winding down and closing up someone else's life. This can involve the mundane, like canceling credit cards and gym memberships, to the emotionally exhausting, like picking out caskets and burial plots. To cope with this, I always tell clients, give yourself time, you are grieving, and you deserve time to grieve before you deal with all the details of death.

We created a detailed checklist that we share with clients to assist them in administering an estate and/or trust. A few of the items on that checklist include:

1. Arrange for the body. This includes honoring the deceased's wishes regarding organ donation or body donation, funeral wishes and burial/cremation wishes. If the deceased did not set out any wishes in a power of attorney or will, or did not talk to anyone about what they wanted, then do what you think is in keeping with the individuals' personality.
2. Locating the individual's will and other important paperwork, like old tax returns. If you cannot find a will, don't stress out, your attorney can help you walk through that process!
3. Start going through your loved one's mail. It is one of the easiest ways to identify where your loved one had bank accounts, safe deposit boxes, and other assets. Start compiling a list of the assets. It is also helpful to review the old tax return and make sure that you have left no stone unturned in terms of assets.
4. If your loved one had social media accounts and left you with instructions for those accounts, follow the instructions. If your loved one did not leave any instructions, it is possible to close down those social media accounts. You will need to contact your attorney to assist with this.
5. Cancel credit cards and services that are no longer needed (cell phone, cable TV). Do not cancel utilities that are still needed.

While there are many tasks that need to be done when a loved one dies, these tasks are a good place to start. Giving yourself time to grieve and understanding that it takes time to draw someone's life to a close can help you feel less overwhelmed.

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