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CHECKLIST OF PEOPLE AND PLACES TO CALL AND TASKS TO PERFORM WHEN A FAMILY MEMBER PASSES AWAY

- **People who need to be called *within a few hours or days* might include:**
 - Immediate family
 - Guardian for minor children
 - Caretaker of decedent's pets
 - Executor of decedent's Will
 - Trustee of decedent's Trust, if any
 - Person named in decedent's Durable Power of Attorney – remind them the Durable Power of Attorney expired at death
 - Organization/Funeral Home named in decedent's Final Disposition Authorization and Instructions – order a sufficient number of death certificates (10-15 copies)
 - Friends and relatives
 - Decedent's business associates

- **Tasks that need to be done *as soon as possible* after death:**
 - Secure decedent's home (if lived alone) and office, change locks if others had access
 - Notify Post Office to forward mail
 - Make sure house and other dwelling(s) have heat/fuel during winter months

- **People who you should plan to call *within the first week* might include:**
 - An experienced probate attorney – make an appointment (if not already named as Executor or Trustee)
 - Trustee of any Trust benefiting the decedent
 - Life insurance company(ies) – request claim forms
 - Veteran's Administration (if applicable) – ask about death and survivor's benefits
 - Insurance company (car and home policies) – update policies to cover the Estate property
 - Personnel department (or labor union) of decedent's employer – ask about death benefits
 - Credit card companies – cancel and CUT the cards
 - Banks and other financial institutions – secure accounts and determine beneficiaries
 - Local Social Security office, if applicable

- **People to call in the first month or so:**
 - Utility companies
 - Department of Motor Vehicles, ask what they need regarding decedent's driver's license and vehicles
 - Decedent's accountant – determine status of income tax returns and inquire if he/she has *experience* in preparing *IRS Form 1041 (Estate Income Tax Return)*

NOTE: This is a *suggested* checklist and by no means intended to be all-inclusive.