

A SURVIVOR'S CHECKLIST

THINGS THAT NEED TO BE DONE
WHEN A LOVED ONE DIES.



CALL US AT
1 (800) 799-3320

✓ IMMEDIATE:

- ☐ Contact friends and relatives. **Allow your friends and relatives to help you out in this time of need.**
- ☐ Within the first 24 hours, look for organ donation records. Check for signed authorizations and arrange immediately.
- ☐ Contact your financial advisor at Trajan Wealth to notify of death.
- ☐ Obtain signed-certified death certificate (consider purchasing 10 to 20 copies) and autopsy records (if applicable)
- ☐ Inventory safe deposit boxes and personal papers of the deceased. Look for burial insurance policies, prepaid mortuary or cremation society plans.
- ☐ Contact mortuary to make burial (or cremation) and funeral arrangements. Arrange for obituary notice.
- ☐ Make arrangements for pets (if any).
- ☐ Cancel regular elder assistance services, if any (such as Meals on Wheels).

✓ WITHIN 30 DAYS:

If there was a Living Trust, contact:

- ☐ Successor Trustee (Trust Manager) for eventual distribution of assets
- ☐ Insurance companies and arrange for any death benefits to be paid to beneficiaries
- ☐ IRA and pension companies for any death benefits to be paid to beneficiaries

If there was NO Trust or a will, contact:

- ☐ County clerk and deposit the original will within 30 days
- ☐ Executor to begin the probate process with an attorney
- ☐ Call your financial advisor for review of possible assistance in sorting out and distributing assets

If applicable, also notify:

- ☐ Your financial advisor for review of possible assistance in sorting out and distributing assets.
- ☐ Social Security Administration to stop checks
- ☐ Department of Health Services if the deceased was receiving Medicare
- ☐ Veterans Administration (if applicable)
- ☐ Payers of any pensions (such as former employer), or annuities
- ☐ Department of Motor Vehicles
- ☐ Also locate documents, including will, trust(s), insurance policies and deeds to real estate

✓ WITHIN 60 DAYS

- ☐ Notify all creditors and utility companies
- ☐ Transfer title on jointly held assets
- ☐ Inventory personal effects and arrange for disposition to family members, friends or charities

✓ WITHIN SIX MONTHS

If surviving spouse:

- ☐ Contact your financial advisor to review and revised financial plan (e.g. replace lost pension, increase safety of remaining assets, etc.)
- ☐ Update your will or trust