



A CHECK LIST

IMMEDIATELY

- ☐ Get a legal pronouncement of death. If no doctor is present, you'll need to contact someone to do this:
- ☐ If the person dies at home under hospice care, call the hospice nurse, who can declare the death and help facilitate the transport of the body.
- ☐ If the person dies at home without hospice care, call 911, and have in hand a do-not-resuscitate document if it exists. Without one, paramedics will generally start emergency procedures and, except where permitted to pronounce death, take the person to an emergency room for a doctor to make the declaration.
- ☐ Arrange for transportation of the body. If no autopsy is needed, the body can be picked up by a mortuary (by law, a mortuary must provide price info over the phone) or crematorium.
- ☐ Notify the person's doctor or the county coroner.
- ☐ Notify close family and friends. (Ask some to contact others.)
- ☐ Handle care of dependents and pets.
- ☐ Call the person's employer, if he or she was working. Request info about benefits and any pay due. Ask whether there was a life-insurance policy through the company.
- ☐ If necessary, the estate's executor should open a bank account for the deceased's estate.
- ☐ Contact: A trust and estates attorney, to learn how to transfer assets and assist with probate issues.
- ☐ Police, to have them periodically check the deceased's house if vacant.
- ☐ Accountant or tax preparer, to find out whether an estate-tax return or final income-tax return should be filed.
- ☐ The person's investment adviser, for information on holdings. Bank, to find accounts and safe deposit box.
- ☐ Life insurance agent, to get claim forms.
- ☐ Social Security (800-772-1213; socialsecurity.gov) and other agencies from which the deceased received benefits, such as Veterans Affairs (800-827-1000; va.gov), to stop payments and ask about applicable survivor benefits.
- ☐ Agency providing pension services, to stop monthly check and get claim forms.
- ☐ Utility companies; change or stop service, postal service, stop or forward mail.

KNOW THE PERSON'S WISHES

For an elderly friend or relative:

WITHIN A FEW DAYS AFTER DEATH

- ☐ Arrange for funeral and burial or cremation. Search the person's documents to find out whether there was a prepaid burial plan. Ask a friend or family member to go with you to the mortuary. Prepare an obituary.
- ☐ If the person was in the military or belonged to a fraternal or religious group, contact that organization. It may have burial benefits or conduct funeral services.
- ☐ Ask a friend or relative to keep an eye on the person's home, answer the phone, collect mail, throw food out, and water plants.

UP TO 10 DAYS AFTER DEATH

- ☐ Obtain death certificates (usually from the funeral home). Get multiple copies; you'll need them for financial institutions, government agencies, and insurers.
- ☐ Take the will to the appropriate county or city office to have it accepted for probate.

- ☐ Know the location of the will, birth certificate, marriage and divorce certificates, Social Security information, life-insurance policies, financial documents, and keys to safe deposit box or home safe.
- ☐ Ask the person's wishes about funeral arrangements, organ donation, and burial or cremation.
- ☐ Have the person complete an advance directive, including a living will, which specifies wanted and unwanted procedures. The person should also appoint a health-care proxy to make medical decisions if he or she becomes incapacitated.
- ☐ Have a do-not-resuscitate order drawn up if the person desires. That tells health-care professionals not to perform CPR if the person's heart or breathing stops and restarting would not result in a meaningful life.
- ☐ Make sure the person gives copies of the documents to his or her doctor and a few family members or friends. Take the documents to the hospital if the person is admitted.