WHAT TO DO WHEN A PERSON DIES

By

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Below is a Checklist of issues to be addressed at a difficult time. Some actions can be handled by family members and other actions are best handled by an experienced estate/probate attorney. This Checklist is not an all-encompassing list, but should assist you with some basic matters following the death of a loved one.

ACTIONS TO BE TAKEN BY FAMILY MEMBERS:

1. Notify immediate family and close friends. ☐

2. Notify attending physician or coroner and deal with with donation of bodily organs. ☐

3. If necessary, decide on procedures to care for dependent children and surviving spouse, if incapacitated. ☐

4. Arrange care for pets, if any. ☐

5. Locate Vital Documents: ☐

   Will, Codicils and Trust Agreements, Burial Instructions, Personal Directory, Bank Records, Insurance Policies, Safe Deposit Keys, Internet PINS and Passwords

6. Decide on funeral arrangements: ☐

   a. Find and review decedent's expressed funeral and burial wishes.
   b. Contact appropriate persons.
   c. Prepare obituary.

7. Evaluate the need for security at decedent's residence: ☐

   a. Cancel home deliveries.
   b. Notify Post Office to change mailing address or to hold mail.
   c. Secure the residence.

8. Evaluate whether there is perishable property to care for or sell. ☐

9. Notify agent under any power of attorney, any trustee or custodian of money or property and other members of family and friends.

10. Secure deceased credit/debit/ATM cards from loss or misuse. ☐

11. Notify the executor or personal representative named in the Will who can then call the lawyer (even if no Will is found). ☐

12. Keep records of **<u>any</u>** payments made for the funeral and other expenses, however such payments should not be made until after consultation with an attorney. ☐

13. Do not pay decedent's debts or distribute any assets until after attorney discusses with family and/or personal representative. ☐

14. Schedule an appointment with an attorney. ☐

15. Investigate the following:

    a. Social Security Benefits ☐
    b. Life Insurance ☐
    c. Union death benefits ☐
    d. Veteran's burial allowance & Veteran's benefits ☐
    e. Employee payroll benefits ☐
        (1) Accrued vacation pay
        (2) Employee death benefits
        (3) Final wages
        (4) Retirement plan death benefits
        (5) Deferred compensation
    f. Medical reimbursements ☐
    g. Refunds on insurance or cancelled subscriptions, or any other refunds ☐
    h. IRA, 401k, and any other retirement accounts ☐

16. Locate life insurance policies and annuity contracts. and contact life insurance agent to collect proceeds or consider options. ☐

17. Obtain death certificates – ask attorney how many are needed. ☐

18. Death Notifications to make:

    a. Social Security Benefits ☐
    b. Department of Veterans Affairs ☐
    c. Medical Insurance Companies ☐
    d. Life Insurance Companies ☐
    e. Retirement/Pension Companies ☐
    f. Decedent's Employer ☐

19. Notify regular insurance agent about fire, theft, and public liability insurance on decedent's assets. ☐

20. Review credit cards and charge accounts/cancel as appropriate. ☐

21. Obtain valuations of assets, as needed. ☐

22. Meet with accountant to prepare decedents last income tax return and/or a fiduciary income tax return. ☐

HIRE ATTORNEY TO ASSIST WITH THE FOLLOWING:

1. Review and analyze the Will and/or Trust. ☐

2. Probate the original Will with the Court and have Personal Representative (Executor) appointed and obtain short certificates. ☐

3. Review estate administration process and procedures. ☐

4. Evaluate joint tenancy assets to determine inheritance tax liability and retitling. ☐

5. Inventory safe deposit box. ☐

6. Assist in collection of insurance, wage claims, retirement benefits. ☐

7. Guide and counsel the Personal Representative in administering the decedent's estate, including: ☐

    a. Opening estate bank account
    b. Locating and valuing assets

c. Notice to PA Department of Welfare (if deceased was 55 or older)
d. Obtaining estate identification number and determining fiscal year
e. Sending legal notices to heirs and beneficiaries; publishing estate notices
f. Notices (with death certificates/short certificates) as appropriate to deceased's banks, brokers, post office, credit cards, annuities and IRAs as needed
g. Inventory of assets
h. Gathering all claims and bills and paying according to statutory priorities
i. Preparation of inheritance tax returns, estate tax returns, and accountings
j. Timing of distributions and closing estate

8. If trust is involved, assist with trust administration and appropriate distribution. ☐

9. Review with family members the impact of decedent's death on their own estate planning. (Redraft wills, trusts, make gifts, review documents). ☐

FOR MORE INFORMATION OR ASSISTANCE, PLEASE CONTACT ATTORNEY WIZELMAN AT (570) 746-3844.

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