

WHAT TO DO WHEN A PERSON DIES

By

Leslie Wizelman, J.D., CELA

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 **any** 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.*

Law Office of Leslie Wizelman
243 Second Street
PO Box 114
Wyalusing, Pennsylvania 18853
www.lesliewizelman.com

Disclaimer: This document is meant for the clients of Leslie Wizelman, Esq. Before acting on any information presented here, you are strongly urged to consult with an attorney who is competent in this area of the law.