

Guidance for when a death occurs (a Post-Death Checklist)*

Law Offices of Beth A. McDaniel PLLC

When a Death occurs. In the midst of grief following the death of a loved one there are a number of decisions that should be made. This checklist is to serve as a guide with regard to decisions that can be made and steps that can be taken prior to meeting with an estate attorney to discuss the administration of an estate:

- Arrange for the care of minor children;
- Arrange for the care of any pets. Note: permanent arrangements should not be made until someone is appointed by the Court with authority to make such arrangements;
- Make arrangements to secure and protect the decedent's property. If multiple people have access to the decedent's residence, make arrangements to change the locks.
- Notify the decedent's landlord, if any, and the suppliers of utilities
- Notify an official of the decedent's church or synagogue
- Determine whether decedent executed a Directive Regarding Disposition of Remains, or otherwise made his or her wishes known.
- Notify the chosen funeral home of the death and make arrangements to transport the body.
- If the decedent served in the military, contact the American Legion or the relevant branch of the military re burial benefits and military burial honors.
- Confirm funeral home has made application for the social security death benefit

If burial:

- Determine whether there was burial insurance or pre-paid arrangements
- Arrange internment space
- Select Memorial Marker and inscription
- Select Casket

- Flowers for casket
- Determine whether embalming is necessary

If Open casket:

- Restorative art
- Cosmetology
- Hair dressing
- Jewelry and glasses
- Clothing

If Visitation:

- Visitation hours

If Graveside service

- Arrange Officiant
- Transportation for family
- Transportation for flowers
- Arrange for a police escort if necessary/appropriate
- Arrange for someone to stay at local families' homes during service

If cremation

- Determine whether there were wishes to inter the remains at a cemetery and follow up if necessary
- Otherwise, determine who shall receive the remains and whether an urn is needed
- Carry out the decedent's wishes regarding his or her remains if he or she has executed a Directive Regarding Disposition of Remains or has otherwise communicated his or her wishes.

- Draft and arrange to have an obituary published (unless decedent has directed there be no obituary).

- Is it appropriate to state a donation suggestion in lieu of flowers?

Make arrangements for a memorial for the decedent

- Clergy to officiate
- Date and time of services

Information for Eulogy (and obituary)

- Grade school, high school, and college attended
- Degrees earned
- Public, civic, and religious positions
- Military record
- Citations
- Hobbies and interests
- Special Accomplishments
- Charitable and Special Wishes
- Select pallbearers, if appropriate
- Select clothing for you and any children
- Transportation for family
- Arrangements for out-of-town guests
- Parking Facilities
- Music
- Slideshow or photo display

- Prepare service program
 - Food for the reception via caterer or potluck
 - Compile thank you note list
 - Notify the personal representative or any trustee, in the decedent's Will or Trust, if other than yourself.
 - If you are the personal representative or trustee, contact an attorney to make an appointment to discuss the estate.
 - Receive any paperwork required of the attorney prior to the appointment and complete the paperwork.
 - Notify the decedent's attorney, friends, family members, employer or employees, clubs, unions and organizations, financial advisor, insurance agent, and physician of the decedent's death.
 - Notify anyone for whom the decedent served as personal representative, trustee, or attorney-in-fact.
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- Assemble Legal Documents
 - Will
 - Living Trust
 - Community Property Agreement
 - Birth Certificate
 - Marriage License
 - Citizenship Papers
 - Insurance Policies
 - Bank Records
 - Deeds to Property

- Auto Titles
- Income Tax Returns
- Veteran Discharge Papers
- Disability Claims
- Cemetery Deed

- Arrange to receive several copies (at least 10) of the death certificate after compiling needed information:
 - Full legal name
 - Home address and phone number
 - How long resided in the state
 - Occupation and Title
 - Social Security Number
 - Veteran serial number
 - Date of death
 - Place of birth
 - Father's name
 - Father's birthplace
 - Mother's maiden name
 - Mother's birthplace
 - Religion
 - Spouse's name (maiden name if wife)

- Search for hidden assets

- Go to ims-dm.com to register the decedent's name on a 'do not contact list' so that the decedent no longer receives junk mail. There is no charge for the registration.
- Determine whether there is a safe deposit box and whether anyone can access it other than the decedent.
 - Ascertain whether there are any Wills or other testamentary documents in the safe deposit box.
- Expenses which will require immediate payment (either by you – subject to reimbursement or from decedent's account, if there is a joint tenant on said account)
 - Clergy
 - Transportation
 - Food
 - Burial Plot
 - Funeral Director
 - Memorial Marker
 - Police Escort (if required)
 - Organist
 - Memorial Service location rental fees
 - Attorney Fees
 - Unexpected expenses

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