

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 to the designated personal representative with regards 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
- 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.
- Secure any Residence
 - Change the locks
 - Remove food that could spoil
 - Water Plants
 - Put interior lights on timers so that the house appears occupied
 - Ask a trusted neighbor or family member to retrieve and keep mail (you will not be able to do a change of address until after you are appointed by the Court).
 - Take a video of photographs of the contents/state of the home.
 - Try to locate and secure possession of the following information/items:
 - a. Original Will, with original Witness Affidavit or Declaration page
 - b. Original signed List Provision if referenced in the Will (i.e., disposing of items of tangible personal property)
 - b. Original Trust Agreements
 - c. Community Property Agreements

- d. Birth certificates, marriage certificates, death certificates
- e. Military records
- f. Financial statements on bank accounts, investment accounts, etc.
- g. Promissory Notes and Deeds of Trust, including payment records
- h. Checkbooks, checks and checkbook registers
- i. Cash
- j. Stock and/or bond certificates
- k. Life insurance policies and/or statements
- l. Annuity policies and/or statements
- m. Copies of rental agreements or property management agreements as to any rental properties the decedent may own
- n. Prior gift records
- o. Last credit card statements and other evidence of bills
- p. Mortgage statements
- q. Prior income tax returns
- r. Password information and other digital information
- s. Secure all computers, laptops, cell phones or other devices that may have compromising information
- t. Safety deposit box keys and other keys (car, home, business, etc.)
- u. Secure all jewelry, coin collections, precious metals and other miscellaneous valuables
- v. Remove and secure guns
- x. Address books to help determine beneficiary contact information

Shred, not dispose, any Sensitive Materials and Documentation. In your duties to search the premises for necessary information, there will be quite a lot of unnecessary documentation that has potentially sensitive information. These should be shredded rather than simply disposed of in the trash.

Contact the Family/Heirs to Notify them Not to Remove Items from the Premises until you are appointed as Personal Representative, have had time to inventory items, set aside listed items and determine a reasonable distribution method.

- Notify close family members, assign another to notify friends
- Notify the chosen funeral home of the death and arrange to transport the body.
- 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.
- Arrange to receive several copies (four to six) 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)
- 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. Note: if there will not be a probate, the account should be kept open for four to six months in care there are refunds)
- 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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