

# AFTER

## DEATH CHECKLIST



BETTER THAN YESTERDAY, LLC  
TAX + FINANCIAL SERVICES

### OBTAIN DEATH CERTIFICATES

You will need several copies of the death certificate to complete many of the tasks on this list.

If the deceased had a will, there is typically an executor named. The executor will need to be involved going forward. An attorney isn't necessary, but very helpful.

### LOCATE WILL & ATTORNEY

If assets aren't listed in the will, then start building an inventory of assets. The probate process usually starts with an inventory of assets. This will also be helpful if theft occurs.

### INVENTORY OF ASSETS

Another list to build is a list of bills to be paid. Also, in this process begin canceling services that are no longer needed. For example: cell phone, streaming services, utilities, etc.

### BILLS/CANCEL SERVICES

Alert financial institutes about the passing of your loved one. This includes banks, investment companies, retirement companies, credit card companies, etc.

### ALERT FINANCIAL INSTITUTIONS

Contact insurance companies to begin terminating policies and filing any final claims for insurance proceeds. This includes life insurance, health/cancer insurance, home, auto, renter, and other policies.

### CONTACT INSURANCE COMPANIES

Publish a public notice to creditors. This formal process informs creditors of the estate and gives them the opportunity to submit unpaid bills. This prevents creditors from surfacing several months or years later demanding payment.

### NOTICE TO CREDITORS

Notify relevant government agencies, such as:

- Social Security Administration (if funeral director doesn't)
- IRS (get a Tax ID for estate, if applicable)
- Medicare
- Veterans Affairs
- Other agencies that provide benefits to the deceased
- DMV to cancel driver's license and voter registration
- Post office to forward mail

### NOTIFY GOVERNMENT AGENCIES

To prevent identity theft, contact major credit reporting agencies, like, Equifax, Experian, and TransUnion. Check in periodically to monitor fraudulent activity.

### CREDIT REPORTING AGENCIES

Contact a tax preparer or tax attorney to help you complete the final tax filing needed on your loved one's estate.

### PREPARE FINAL TAX RETURNS