

Death of a Family Member Checklist

Presented by David M. Weidmayer, CFP®

It can be extremely difficult to focus on administrative and other tasks when dealing with the loss of a family member. This checklist will help you account for all the various details that need to be addressed.

Contact:

- Funeral home
- Primary care physician
- Deceased's place of worship
- Close family and friends
- Deceased's current and past employers
- Associations, clubs, unions, and professional organizations
- Financial advisor
- Insurance companies, including health, dental, life, disability, long-term care, automobile, and home insurers
- Attorney, if necessary
- Accountant
- Executor
- Trustee
- Service providers, such as housekeepers, landscapers, trash collectors, and so on
- Landlord
- Doctors, dentists, and other health care professionals
- Credit card companies
- U.S. Post Office
- Social Security Administration
- Veterans Administration
- U.S. Citizenship and Immigration Services (if not a U.S. citizen)
- State Department of Motor Vehicles
- Credit-reporting agencies

Arrange for:

- Funeral, cremation, or memorial services, if not prearranged
- Your own bereavement leave
- Obituary
- Certified copies of death certificates

- Security for deceased's home and close relatives during the funeral
- Care for minors and dependent family members
- Care for pets

Locate:

- Estate documents (wills, trusts, and written preferences for final arrangements)
- Prior arrangement for anatomical gift
- Prepaid funeral or cremation documents
- Deed to cemetery plot
- Safe deposit box, if any
- Deeds and titles of property
- Birth, marriage, divorce, prenuptial, child support, and military discharge documents
- Birth or adoption documents of children
- Brokerage and bank account statements and checkbooks
- Credit card statements
- Pension and retirement plan administrators
- Life insurance contracts, including policies through associations, employers, and banks
- Annuity contracts
- Business buy-sell agreements

Please note: Some items will be completed by the executor or personal representative in the course of opening the probate process.

This material has been provided for general informational purposes only and does not constitute either tax or legal advice. Although we go to great lengths to make sure our information is accurate and useful, we recommend you consult a tax preparer, professional tax advisor, or lawyer.

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David M. Weidmayer is a financial advisor located at 9850 Westpoint Drive, Suite 550 Indianapolis, IN 46256. He offers securities and advisory services as an Investment Adviser Representative of Commonwealth Financial Network®, Member FINRA/SIPC, a Registered Investment Adviser. He can be reached at (317) 579-9400 or at dave@wwealthsolutions.com.

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