

WHAT TO DO IF YOUR PARENT PASSES AWAY

Losing a parent is an incredibly heartbreaking and challenging experience. The pain of their absence can feel overwhelming, and navigating the aftermath can be daunting. In such a difficult time, it is crucial to have a clear understanding of the next steps to take. Having the knowledge of the necessary steps can help alleviate some of the stress and uncertainty during this difficult time.

◆ IMMEDIATELY AFTER DEATH:

- ☐ Get legal pronouncement of death
- ☐ Get certified death certificate
- ☐ Call your attorney and/or advisor, if applicable
- ☐ Locate your parent's will and/or trust(s)
- ☐ Notify your parent's employer, if applicable
- ☐ Learn about existing funeral and burial plans
- ☐ Notify the Social Security Administration as well as Medicare or Medicaid

◆ WITHIN A FEW DAYS OF DEATH:

- ☐ Make funeral, burial, or cremation arrangements
- ☐ Notify family, friends, social groups, and religious organizations
- ☐ Contact the local newspaper to create an obituary
- ☐ Secure the property (lock up their home, protect valuables)
- ☐ Make arrangements for children and pets, if applicable
- ☐ Forward mail

◆ WITHIN TWO WEEKS AFTER DEATH:

- ☐ Secure copies of the certified death certificate
- ☐ Take the will to probate
- ☐ Notify all insurance companies
- ☐ Meet with their (or your) trust/estate attorney or find one if you don't have one already to advise on next steps
- ☐ Collect documents needed for a final tax return; file by the next tax deadline
- ☐ Contact all three major credit bureaus
- ☐ Meet with your accountant/tax preparer
- ☐ Make an inventory of all assets/track down additional assets
- ☐ Make a list of bills
- ☐ Cancel driver's license and services no longer needed (subscriptions, etc.)
- ☐ Delete or memorialize social media accounts
- ☐ Update voter registration
- ☐ Discuss next steps with a financial professional

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◆ RECORDS TO GATHER & REVIEW:

- ☐ Certified death certificate
- ☐ Will
- ☐ Property deeds, titles, and documentation
- ☐ Marriage certificate
- ☐ Insurance policies
- ☐ Social Security numbers (yours & spouse's)
- ☐ Current bank statements
- ☐ Mortgage and other loan statements
- ☐ Retirement & non-retirement statements
- ☐ Health insurance policies
- ☐ Tax records
- ☐ Household bills
- ☐ Beneficiary information (insurance & financial accounts)
- ☐ Trust documents
- ☐ Certificates of deposit
- ☐ Digital services, subscriptions, or deliveries
- ☐ Frequent flier or buyer programs

