

- If you haven't already, notify relevant parties of the death. You will need to send death certificates in many cases.
- Consider government benefits such as Civil Service benefits, Veteran's benefits, Social Security survivor benefits, state survivor benefits, Public Safety Officers' Benefits, Federal Employee benefits, and Department of Defense benefits.
- Continue to diligently check the mail and notify senders of the death. Don't leave mail languishing in mailboxes, especially mail that could be useful to thieves.
- Contact insurance companies, if necessary meet with real estate professionals, and get a copy of the deceased's credit report to check for unauthorized activity.
- Continue any action required to start or proceed with probate or estate proceedings.
- Consider where you are in your grieving process. If you're still feeling overwhelmed and emotional after six months, you may want to think about seeking professional help.
- Don't forget about taxes. If you're going through the probate process, filing the last tax return is part of the end of that process. If not, it's important to file the Deceased's last tax return. Many states have a filing deadline of nine months after death.

Contacts:

- The Social Security Administration
- The Deceased's doctor(s)
- Outside organizations with which the Deceased had a relationship. For example, neighborhood, charitable, or faith-based organizations
- All benefit providers
- Credit card companies
- Subscription services (magazines, newspapers)
- Personal services (phone, pager, prescription medications, recurring appointments)
- Non-essential utilities (phone, cable, etc).
- Institutions where the Deceased used automatic bill pay
- The Deceased's lawyer or executor of the will

The contents of this checklist are intended to provide helpful suggestions to a family member or other survivor who has assumed the duties of concluding the affairs of a loved one/decendent. The list is not intended to be exhaustive. It is not intended to provide legal, financial, or mental health advice nor to be relied on in lieu of such services. If you have specific questions you may find it helpful to consult with a probate attorney, financial professional, or mental health professional.