



## **Checklist: What to do When Someone Dies**

What to do when someone dies:

If someone dies at home, call 911 if you want the support of emergency personnel, or report the death to the county coroner. If the person has been a patient under hospice care, the hospice staff will take care of things. Get in touch with family and friends to help with some of the immediate tasks such as getting in touch with relatives.

Make arrangements for the deceased person's body, according to appropriate instructions by the coroner, if the body or organs are donated, or by the crematory or funeral home. Information or instructions may be found in a living will, health care power of attorney or a will. Get certified copies of the death certificate (at least 6-8).

Other things that will need to be done in the days and weeks following the death:

- Delay major financial decision
- Control spending and identify emergency funds available
- Continue to pay the bills
- Confirm health care coverage
- Manage business affairs
- Review death benefits
- Identify life insurance beneficiaries
- Establish social security survivor benefits
- Pay taxes (nearly all of this information could be contained in a letter of instruction)
- Get help if you need some

If you are mourning the death of a loved one, you may continue to need support from family and friends. Here are some considerations for the short term future:

*This overview is intended for educational purposes only and may not be considered legal advice.*



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- Be mindful and cautious about your emotions
- Organize your financial records
- Start developing a long term budget
- Discuss financial situation with your family
- Make arrangements to transfer or share ownership where appropriate
- Review insurance policies and beneficiary designations
- Notify/Contact known creditors
- Contact professional advisors – attorney and financial
- Update your estate planning documents
- Settle the estate of your decedent

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