SECURE MONEY ADVISORS

# A Survivor's Checklist

Things that need to be done when a loved one dies

**Keep with your important papers**

## Immediate

- ☐ Obtain signed death certificate and autopsy records. *(if applicable)*
- ☐ Within the first 24 hours, look for authorized organ donations records and arrange immediately.
- ☐ Inventory safe deposit boxes and personal papers of the deceased. Look for burial insurance policies, prepaid mortuary or cremation society plans.
- ☐ Contact mortuary to make burial/cremation and funeral arrangements. Arrange for obituary notice.
- ☐ Contact friends and relatives. ***Allow your friends and relatives to help you out in this time of need.***
- ☐ Make arrangements for pets. *(if any)*
- ☐ Cancel regular elder assistance services, such as Meals on Wheels. *(if any)*
- ☐ Obtain certified copies of death certificate from the mortuary *(consider purchasing 10 to 20 copies).*

## Within 30 Days

- ☐ Contact **Secure Money Advisors (724) 382-1298** for review of possible death and/or income taxes owing and assistance in sorting out and distributing assets.
- ☐ Locate documents, including will, trust(s), insurance policies and deeds to real estate.
- ☐ If applicable, notify:
  - *Social Security Administration to stop checks*
  - *Department of Health services if the deceased was receiving Medi-Cad*
  - *Veterans Administration*
  - *Payers of any pensions (such as a former employer), or annuities*
  - *Department of Motor Vehicles*
- ☐ If there was a Living Trust or WILL contact:
  - *Successor Trustee (Trust Manager) for eventual distribution of assets*
  - *Insurance companies and arrange for any death benefits to be paid to beneficiaries*
  - *IRA and pension companies for any death benefits to be paid to beneficiaries*
  - *County of clerk and deposit the original WILL within 30 days*
  - *Executor to begin the probate process with an attorney*

## Within 60 Days

- ☐ Notify all creditors and utility companies.
- ☐ Transfer title on jointly held assets.
- ☐ Inventory personal effects and arrange for disposition to family members, friends or charities.

## Within 6 Months *(if surviving spouse)*

- ☐ Contact **Secure Money Advisors 724.382.1298** for review of finances and revised financial game plan. *(e.g., replace a lost pension, increase safety of remaining assets, etc.)*
- ☐ Update your will or trust.

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