

What To Do When: A Loved One Passes Away



Make funeral arrangements

Did your loved one already make arrangements or leave instructions? An experienced funeral director can be very helpful and offer services, including obtaining death certificates (usually 5 or more are needed).



Notify people of the death

- » Family & Friends
- » Employer, Social Security, VA, Pension, etc.
- » Insurance, Banks, Brokerages, IRAs, etc.

***Note:** Failure to notify even a distant or estranged family member can engender deep feelings of mistrust and resentment.



Gather important documents

- » Bank and Brokerage statements
- » Bills
- » Deeds to real property wherever located
- » Estate plan (will, trust, etc.)
- » Life insurance policies and Annuities
- » Safe deposit box
- » Social Security and Pension
- » Stocks and Bonds
- » Tax returns
- » Titles to motor vehicles, like mobile homes and golf carts



Contact an experienced attorney for estate and trust administration

Whether your loved one had a will, trust, both, or neither, an attorney can help you determine the steps necessary to legally transfer assets, deal with the debts, and finalize the deceased's financial affairs, whether full probate or small estate.

The probate process, as it is often called, will depend on the assets and debts involved and the deceased's estate planning documents (or lack thereof). It can take a year or more to complete.



Update your legal documents

Once things have settled down, update your own legal documents and estate plan. Use the Strong arm of the law to protect what matters.

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