

When Someone Dies

Checklist

H.E.L.P.

Healthcare and Elder Law Programs

Use H.E.L.P.'s checklist to keep track of what needs to be done by placing an "X" in the box when the task has been completed.

- Notify immediate family and close friends.
- Notify attending physician or coroner.
- Notify agent under any power of attorney.
- Deal with donation of bodily organs to an "organ bank," as appropriate.
- Find and review Decedent's expressed funeral and burial wishes.
- Arrange care for dependents, if any.
- Evaluate the emotional impact on the surviving spouse, children and close relatives and friends; arrange for support.
- Arrange care for pets, if any.
- Evaluate the need for security at Decedent's residence.
- Find perishable property (food, plants, etc.), arrange for care or disposal.
- Cancel or rearrange home deliveries.
- Have Post Office hold mail.
- Arrange for mortuary, cemetery, burial, cremation, as appropriate.
- Arrange funeral, burial or memorial services.
- Notify other members of family and friends.
- Prepare and arrange for obituary.
- Obtain death certificates (ask an attorney how many are needed, if unsure).
- Keep records of all payments for funeral and other expenses.
- Locate safe deposit box(es); follow safe deposit box procedures (see page 2).
- Locate wills, codicils, and trusts.
- Locate life insurance policies.
- Locate other important documents, relationships, accounts, investments, etc.
- Advise Social Security, Medi-Cal, other agencies as appropriate.
- Investigate social security benefits.
- Investigate life insurance.
- Investigate union death benefits.
- Investigate veteran's burial allowance and other benefits.
- Investigate fraternal organizations.
- Investigate employee benefits, including accrued vacation pay, death benefits, retirement plans, deferred compensation, final wages, and medical reimbursements.
- Investigate refunds on insurance or canceled subscriptions.
- Investigate Keogh and IRA accounts.
- Investigate business, partnership and investment arrangements.
- Retain and meet with attorney regarding estate matters.
- Retain and meet with CPA as to tax and accounting matters.
- Meet with life insurance agent to collect proceeds or consider options.
- Deal with fire, theft, liability and auto insurance on Decedent's property.
- Work with attorney and CPA to prepare asset inventory, list of accounts and debts.
- Obtain valuations of assets, where appropriate.
- Review credit cards and charge accounts, cancel as appropriate.
- DO NOT pay any of Decedent's debts until attorney discusses with family or executor.
- If Trust involved, arrange for any allocations and transfers.
- Arrange for final income tax return and estate tax return, as necessary.

California Safe Deposit Box Access Procedures

Suggestion: If there is any danger of a will or trust contest, or a conflict between executor, trustee, family or beneficiaries, DO NOT go to safe deposit box without the involvement of an attorney experienced with estate administration.

Owner(s) Deceased: California Probate Code Section 331 authorizes a person who has the key to a safe deposit box of a deceased person to have access to the box, even before any action has been taken with the probate court. The financial institution shall first obtain proof of the decedent's death and reasonable proof of the identity of the person seeking access. The person may then:

- Open the box (under the supervision of an officer or employee of the financial institution),
- Make an inventory of the contents,
- Remove instructions for disposition of the decedent's remains, and
- After copies have been made and placed in the box, remove wills and trust instruments.

Except for disposition instructions, wills and trust instruments, no other contents shall be removed under these provisions. The person shall deliver all wills found in the box to the clerk of the superior court, and mail or deliver a copy to the person named as executor.

Surviving Co-Owner(s): Surviving Co-Owners have the right to access, as provided in their agreements with the financial institution. When accessing a safe deposit box after the death of a co-owner:

- At least two people should be present at the first opening, and should make an inventory of the contents in detail on letter size paper, with both persons signing and dating the paper.
- After copies have been made and placed in the box, remove documents as needed.