



Checklist: Things To Do When a Person Passes Away

Immediately:

- Notify the person's doctor or the county Medical Examiner. Arrange for organ donation if the person wished to do so.
- Get a legal pronouncement of death. If no doctor is present, you'll need to contact someone to do this:
 - If the person dies at home under hospice care, call the hospice nurse, who can declare the death and help facilitate the transport of the body.
 - If the person dies at home without hospice care, call 911, and have in hand a do-not-resuscitate document if it exists. Without one, paramedics will generally start emergency procedures and, except where permitted to pronounce death, take the person to an emergency room for a doctor to make the declaration.
- Arrange for transportation of the body. If no autopsy is needed, the body can be picked up by a funeral home (by law, a mortuary must provide price info over the phone) or crematorium.
- Notify close family and friends. (Ask some to contact others.)
- Handle care of dependents and pets.
- Call the person's employer, if he or she was working. Request info about benefits and any pay due. Ask whether there was a life-insurance policy through the company.

Within a few days after a person passes:

- Arrange for burial or cremation. Search the person's documents to find out whether there was a prepaid burial plan. Ask a friend or family member to go with you to the mortuary. Prepare an obituary.
- Keep records of all payments for funeral and other expenses.
- Enlist help for the funeral or memorial (with meals, pallbearers, etc.)
- If the person was in the military or belonged to a fraternal or religious group, contact that organization. It may have burial benefits or conduct funeral services.
- Ask a friend or relative to keep an eye on the person's home, answer the phone, collect mail, throw food out, and water plants.
- Cancel or rearrange home deliveries or home services
- Keep track of those who send flowers, donations, meals, etc. so you can acknowledge them later.

Continued on next page



Up to 10 days after a person passes:

- Obtain death certificates (usually from the funeral home). Get multiple copies; you'll need them for financial institutions, government agencies, and insurers.
- Take the will to the appropriate county or city office to have it accepted for probate.
- DO NOT pay any of Decedent's debts until attorney discusses with family or executor.
- If necessary, the estate's executor should open a bank account for the deceased's estate.
- Contact Social Security (800-772-1213; socialsecurity.gov)
- Contact other agencies from which the deceased received benefits (Medicaid, Unions, retirement accounts,)
- Contact Veterans Affairs (800-827-1000; va.gov), to stop payments and ask about applicable survivor benefits, burial assistance.
- Contact agency providing pension services, to stop monthly check and get claim forms.
- Contact agencies to stop/change service: creditors, utility companies, postal service, insurance companies (health, home, car, etc.)
- Review credit cards and charge accounts, cancel as appropriate.
- Make a list of bills to provide to executor or estate administrator
- Contact a trust and estates attorney, to learn how to transfer assets and assist with probate issues.
- Contact the person's investment adviser, and/or investigate business, partnership and investment arrangements.
- Contact the person's bank(s) to find accounts and safe deposit box.
- Contact the person's life insurance agent, to get claim forms.
- Investigate employee benefits, including accrued vacation pay, death benefits, final wages, retirement plans, deferred compensation, medical reimbursements.

10 days or more after a person passes:

- Send Thank you notes
- Contact an accountant or tax preparer, to find out whether an estate-tax return or final income-tax return should be filed.
- Work with attorney and CPA to prepare inventory, list of accounts and list of debts.
- Arrange for final income tax return and estate tax return, as necessary.
- Other places to notify or cancel: notify credit reporting agencies, cancel driver's license, cancel email & website accounts, cancel memberships in organizations, contact the election board to remove name from voter registration

*Information was compiled from various sources including: Consumer Reports, AARP, and estate planning attorneys

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*Information courtesy of ADRC of Dane County. The ADRC does not endorse or recommend specific agencies.