



"Be kind, for everyone you meet is fighting a battle you know nothing about." - Wendy Mass

What To Do When Your Loved One Dies Checklist

This is not an all-encompassing list. There may be other actions you need to take given your circumstances. It's meant to be educational and help you organize everything after your loved one dies. There are blank spaces for you to add your own actions.

You may want to consider keeping a dedicated binder or folder with the paperwork you receive after someone dies. You may need to reference it in the future.

Complete	Action	Notes
Immediately After Death		
	Get a Legal Pronouncement of Death	
	Take Care of Dependents and Pets	
	Notify Friends, Family, and Employer	



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Within a Few Days of Death		
	Enlist Friends and Family to Help	
	Make Funeral or Cremation Arrangements	
	Take Care of Loved One's Home	
	Handle the Mail	



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Up to 4 Weeks After Death		
	Get Certified Copies of Death Certificate	
	Find the Will	



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	Meet with an Estate Attorney	
	Meet with a Financial Planner	
	Meet with an Accountant	
	Notify Financial Institutions	
	Notify Insurance Companies	
	Cancel Services and Organize Bills	
	Notify Social Security Administration	
	Notify Pension Company	



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	Notify Credit Bureau Agencies	
	Notify IRS	
	Notify DMV	
	Keep Journal of What is Happening	



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Up to 6 Months After Death		
	Update Your Documents	
	Remove from Financial Accounts and Property	
	Complete Required Minimum Distributions (RMDs)	
	Obtain Date of Death Valuation and Step Up Cost Basis	
	Cancel Appointments and Trips	
	Change Social Media	



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	Notify Voter Registration	
	Continue Monitoring Bank and Credit Card Accounts	