Sessa & Dorsey
AN ESTATES AND TRUSTS LAW FIRM

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Family Guide Checklist

Upon the death of your loved one, we recommend that you first contact the decedent's estate planning attorney to determine if the decedent signed a Last Will and Testament and/or expressed his or her wishes with respect to burial, cremation, and funeral arrangements.

Once a Personal Representative of the Estate or Trustee of the Trust is appointed, that individual should turn his or her attention to handling the decedent's financial affairs, as follows:

- ☐ Notify the accountant and financial advisor.
- ☐ Notify the Social Security Administration (some funeral homes will handle), and apply for Social Security survivor benefits, if applicable, at 800-772-1213.
- ☐ Organize usernames and passwords for online bill payment, bank accounts, social media, etc.
- ☐ Close social media accounts (Facebook, Instagram, Twitter, etc.).
- ☐ Cancel utilities when appropriate (water, electric, gas, home phone, cable).
- ☐ Cancel cell phone contracts.
- ☐ Notify the post office or set up mail forwarding.
- ☐ Cancel any memberships (gym, mail-order clubs, fraternal organizations).
- ☐ Apply for or cancel pension and/or retirement benefits.
- ☐ Cancel workers' compensation benefits.
- ☐ Notify the Department of Motor Vehicles.
- ☐ Notify insurance companies and file claims if applicable, for the following:
  - ☐ Life insurance
  - ☐ Medical insurance
  - ☐ Disability insurance
  - ☐ Travel and accident insurance
  - ☐ Homeowners insurance
  - ☐ Automobile insurance
  - ☐ Retirement benefits
- ☐ Notify credit card companies.

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