



HOMEGOING CHECKLIST

Within 48 hours:

- ☐ Notify immediate family and close friends of the deceased.
- ☐ Arrange / Confirm any anatomical gifts.
- ☐ Contact the funeral home.
- ☐ Coordinate service arrangements.
- ☐ Notify family and friends of funeral arrangements.
- ☐ Write obituary and place in newspaper(s).
- ☐ Request Certified Death Certificate copies (one certified copy for each of deceased's life insurance policies, car title, house deed, bank and brokerage accounts, etc.)
- ☐ Notify estate attorney and accountant.
- ☐ Confirm that family members know who has been appointed the Executor(s), sometimes referred to as the Personal Representative(s), because the Executor(s) will be responsible for the deceased's estate.

Within One Week:

- ☐ The surviving spouse must be financially functional, which may mean opening new accounts, paying bills, and filing insurance claims.
- ☐ Report the death to Social Security (800) 772-1213. If the deceased was receiving Social Security benefits, cancel direct deposit unless SSA directs otherwise.
- ☐ Notify the current employer's HR Department. File for death benefits and any outstanding salary, vacation, or sick pay owed to deceased. Inquire about continuing spousal health coverage, if applicable.
- ☐ Notify past employer(s) regarding pension plans, if applicable.
- ☐ Notify the church and any professional organizations the deceased was a member of.



Within Two Months

- ☐ The Executor(s) is legally appointed by the court.
- ☐ Open a bank account for the estate.
- ☐ Contact financial institutions holding accounts in the deceased's name. Close jointly held accounts and open new ones. Close accounts held solely by the deceased and cancel credit cards solely in the deceased's name.
- ☐ Inventory valuables.
- ☐ Notify health, home, business, auto and disability insurance companies.
- ☐ Update auto titles and payments.
- ☐ Contact Veterans Administration, if applicable.
- ☐ Cancel memberships and subscriptions, if applicable.
- ☐ Cancel or redirect the deceased's mail.
- ☐ Cancel or re-title utility bills.

Within a Reasonable Time

- ☐ File the will with the appropriate state and probate court. If real estate was owned outside the state, file ancillary probate in that state.
 - ☐ A federal estate tax return may need to be filed within nine months of death. State estate/inheritance tax returns may also be required.
 - ☐ Update your beneficiary and payable on death (POD) designations if deceased was a beneficiary for insurance policies, retirement accounts, certificates of deposit, savings bonds, etc.
 - ☐ Update your own will.
 - ☐ Distribute personal belongings.
 - ☐ Consider writing thank you notes to friends and family members who have helped you during this challenging time.
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