

To Do WITHIN FIRST WEEK OF DEATH

- Get a legal pronouncement of death
- Tell friends and family
- Notify your loved one’s employer
- Arrange for organ donation if desired
- Find out about any pre-planned funeral arrangements
- Make funeral/cremation arrangements
- Secure all property
- Provide care for pets and indoor plants
- Notify Banks, Financial Advisors, & Insurance Agents
- Notify Accountant/CPA
- Notify Family Attorney
- Notify Social Security Administration
- If your loved one is a Veteran, contact Veteran's administration
- Locate will and trust documents
- Locate Life Insurance policies

FUNERAL PLANNING GUIDE

- Decide on the type of service:
Funeral, Memorial or Graveside
- Choose a funeral home
- Set time & date
- Make cemetery arrangements
- Make funeral arrangements
- Get a friend/relative to write an obituary
- Order a casket or urn
- Coordinate casket transportation
- Order a headstone
- Choose inscription or grave marker
- Order printed materials and flowers
- Arrange memorabilia or videos
- Choose music/songs
- Gather clothing for deceased
- Choose an officiant
- Choose pallbearers
- Choose persons to read select passages

WITHIN A FEW WEEKS AFTER DEATH

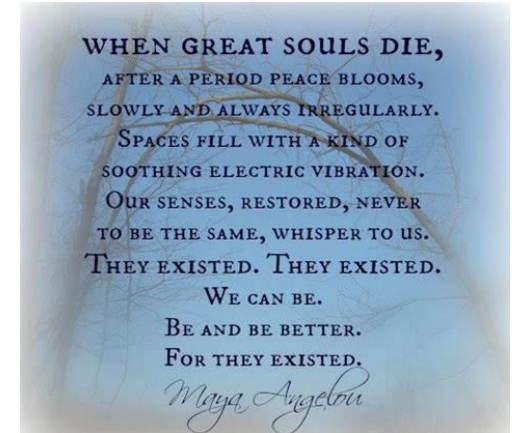
- Secure certified copies of death certificates
- Meet with a trust and estates attorney
- Take the original will to probate (Often County Clerk’s office)
- Obtain Letters of Testamentary naming representative for the estate
- Obtain a Tax ID number for the estate
- File a request to forward mail (if needed)
- Track down and make an inventory of all assets
- Send a letter to all three major credit bureaus
- File claims for benefits
- Make a list of bills and plan payment or cancel
- Register for DMA "Do Not Contact" List
- Notify creditors, utilities, as well as any other organizations they belong to

OTHER ITEMS TO COMPLETE

- Transfer assets to beneficiaries or to the name of the estate including changing titling of property
- Complete estate settlement process
- File final estate tax return and pay any taxes required
- Update beneficiaries for new accounts after asset transfers are completed

DOCUMENTS NEEDED

- Bank statements
- Bearer bonds or stock certificates
- Investment account statements
- Deeds & Title documents
- Vehicle registrations/titles/loans
- Marriage/Divorce papers
- Prenuptial agreement
- Tax documents
- Military papers
- Birth certificate
- Social security card/papers



CANCEL

- Driver's license
- Voter’s registration
- Close credit card accounts
- Determine any insurance policies to be canceled
- Delete or memorialize social media accounts
- Close email accounts
- Cancel services/subscriptions no longer needed

OAKLEY & IRVING WEALTH MANAGEMENT
SAMPLE DEATH NOTIFICATION
LETTERS FOR CREDIT BUREAUS

Date]

Dear [Credit Bureau Name],

This letter is to inform you of the death of [Name]. I request that a formal death notice be added to [his/her] file. [Name's] full name was [Full Name] and [he/she] resided at [address]. [His/her] birthday was [date], and [his/her] Social Security Number was [Number].

[Name] died on [date]. I have enclosed a certified copy of the death certificate with this request.

My name is [Your Full Name], and I am the deceased's [relationship to relative]. I am [his/her] [executor/administrator]. I have included documents proving our relationship.

Thank you for your assistance. My phone number is [number] and my email address is [email]. Please let me know if you require further information.

Sincerely,

[Your Name]

OAKLEY & IRVING WEALTH MANAGEMENT
LIST OF ASSETS

LIST OF BILLS/DEBTS

RESOURCES
SOCIAL SECURITY ADMINISTRATION
1-800-772-1213 https://www.ssa.gov/
VETERANS ADMINISTRATION
1-800-698-2411 https://www.va.gov/
ORGANDONOR.GOV
Post office USPS.com
DMAchoice.org
3 MAJOR CREDIT REPORTING AGENCIES
Experian - 888-397-3742
Equifax - 800-685-111
TransUnion - 800-888-4213

OAKLEY & IRVING WEALTH MANAGEMENT



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We are deeply sorry to hear about the loss of your loved one. During this difficult time, it can be hard to focus or even know what the first step is after your loved one passes. We have put together this checklist to help ease some of the burden and guide you in the right direction. Please know that we are here to help in every way we can.

Most sincerely,

Oakley & Irving Wealth Management