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Checklist: Steps to Take When Someone Dies

A death requires immediate actions, administrative responsibilities, and longer-term steps to ensure everything is managed properly. Your responsibilities will be greater if you're the executor of the deceased's estate.

Emergency Contact Information

Executor responsibilities: Legal and financial tasks directly tied to the estate, such as filing for probate, managing assets, settling debts, and distributing assets.

Non-executor responsibilities: Tasks related to immediate needs, funeral arrangements, and caring for dependents or pets can be handled by family members or close friends.

Shared or delegated tasks: Some responsibilities, like managing digital accounts or notifying certain parties, can be shared or delegated depending on the family's needs and the executor's preferences.

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Immediate Actions

Typically Handled by Family or Close Friends

- **Notify immediate family and close friends:** Inform close relatives and friends about the death.
- **Contact the appropriate authorities:**
 - **Doctor or coroner:** If the death was expected, contact the family doctor. If unexpected, contact emergency services.
 - **Funeral home:** Begin arrangements with a funeral home of your choice.

- **Secure the property immediately:** Ensure the deceased's home and belongings are initially secured right after the death to prevent theft or damage. This includes locking doors and windows and potentially notifying neighbors or a security company.
 - **Care for dependents and pets:** Arrange care for any children, elderly dependents, or pets.
 - **Arrange the funeral or memorial service:** Family members or close friends usually [handle funeral arrangements](#), though the executor may assist or oversee if requested by the deceased in their will.
 - **Write an obituary:** An obituary is often [written by people close to the deceased person](#), such as family or friends, though funeral homes or professional obituary writers sometimes help with this.
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Responsibilities That Can Be Shared or Delegated

Within the First Few Days

- **Obtain a legal pronouncement of death:** This may be done by a doctor, hospice nurse, or emergency services (handled by family or executor).
- **Get multiple copies of the death certificate:** The executor or a family member can [request multiple copies](#) for various legal and administrative processes.

Within the First Two Weeks

- **Manage digital accounts and social media:** The executor may manage the deceased's digital presence, but this can also be delegated to a trusted family member.
 - **Close or transfer utilities and services:** The executor or a family member can handle utilities and service accounts.
 - **Cancel or transfer subscriptions:** Family members can assist with canceling subscriptions (magazines, streaming services).
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Executor Responsibilities

- **Locate the will and important documents:** The executor must locate the will and any trust documents outlining the deceased's wishes and instructions for managing the estate.
- **Read the will and understand executor duties:** The executor must read the will to understand their responsibilities, including distributing assets and paying debts.
- **Meet with an attorney:** The executor should consult with a probate attorney to understand legal responsibilities, especially for complex estates.
- **File for probate:** The executor is responsible for filing the will with the probate court to be officially appointed and to start the probate process.

Within the First Few Days

Notify relevant parties:

- **Financial institutions:** The executor must notify banks, credit unions, and investment firms to freeze accounts.
- **Creditors:** The executor must inform creditors of the deceased's death and ascertain outstanding debts.
- **Government agencies:** The executor notifies agencies like Social Security and Veterans Affairs (if applicable).

Within the First Two Weeks

- **Secure and manage the estate's property on an ongoing basis:**
 - **Safeguard valuables:** Executors should protect valuable assets like jewelry, vehicles, and personal property on an ongoing basis to ensure their safety until the estate is settled.
 - **Manage the deceased's residence:** Executors ensure that the property remains secure and maintained. This may include arranging for lawn care, forwarding mail, or checking on the property regularly to prevent vandalism or deterioration.

Within the First Month

■ Inventory assets and debts:

- **Create an inventory of assets:** The executor lists all assets, including real estate, personal property, investments, and bank accounts.
- **Identify debts and liabilities:** The executor lists all debts, such as mortgages and credit card obligations.
- **Open an estate bank account:** The executor opens a bank account to manage the estate's finances, including paying debts and distributing inheritances.

■ Pay off debts and final bills

- **Settle outstanding debts:** The executor pays legitimate debts from the estate.
- **Manage recurring bills:** The executor ensures necessary bills (utilities, mortgages) are paid from the estate account.
- **Notify insurance companies:** The executor contacts life, health, and property insurance companies to cancel coverage or file claims.

Within the First Few Months

- **Distribute assets according to the will:** The executor is responsible for distributing assets as outlined in the will. This may include selling assets or transferring ownership.
- **Close financial accounts:** The executor [closes remaining financial accounts](#) after debts are paid and assets are distributed.

Longer-Term Actions

- **File the final tax return:** The executor files the deceased's final tax return and pays any taxes due from the estate's funds.
- **Close the estate:** The executor files a final accounting with the probate court to close the estate after all obligations are met.
- **Keep records of all transactions:** The executor should maintain detailed records of all estate transactions, communications, and actions.