

WHAT TO DO WHEN A PERSON DIES

By

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Below is a Checklist of issues to be addressed at a difficult time. Some actions can be handled by family members and other actions are best handled by an experienced estate/probate attorney. This Checklist is not an all-encompassing list, but should assist you with some basic matters following the death of a loved one.

ACTIONS TO BE TAKEN BY FAMILY MEMBERS:

1. Notify immediate family and close friends. _____
2. Notify attending physician or coroner and deal with with donation of bodily organs. _____
3. If necessary, decide on procedures to care for dependent children and surviving spouse, if incapacitated. _____
4. Arrange care for pets, if any. _____
5. Locate Vital Documents: _____

Will, Codicils and Trust Agreements, Burial Instructions,
Personal Directory, Bank Records, Insurance Policies,
Safe Deposit Keys, Internet PINS and Passwords
6. Decide on funeral arrangements: _____
 - a. Find and review decedent's expressed funeral and burial wishes.
 - b. Contact appropriate persons.
 - c. Prepare obituary.
7. Evaluate the need for security at decedent's residence: _____
 - a. Cancel home deliveries.
 - b. Notify Post Office to change mailing address or to hold mail.
 - c. Secure the residence.
8. Evaluate whether there is perishable property to care for or sell. _____

9. Notify agent under any power of attorney, any trustee or custodian of money or property and other members of family and friends. _____
10. Secure deceased credit/debit/ATM cards from loss or misuse. _____
11. Notify the executor or personal representative named in the Will who can then call the lawyer (even if no Will is found). _____
12. Keep records of **any** payments made for the funeral and other expenses, however such payments should not be made until after consultation with an attorney. _____
13. Do not pay decedent's debts or distribute any assets until after attorney discusses with family and/or personal representative. _____
14. Schedule an appointment with an attorney. _____
15. Investigate the following:
 - a. Social Security Benefits _____
 - b. Life Insurance _____
 - c. Union death benefits _____
 - d. Veteran's burial allowance & Veteran's benefits _____
 - e. Employee payroll benefits _____
 - (1) Accrued vacation pay _____
 - (2) Employee death benefits _____
 - (3) Final wages _____
 - (4) Retirement plan death benefits _____
 - (5) Deferred compensation _____
 - f. Medical reimbursements _____
 - g. Refunds on insurance or cancelled subscriptions, or any other refunds _____
 - h. IRA, 401k, and any other retirement accounts _____
16. Locate life insurance policies and annuity contracts. and contact life insurance agent to collect proceeds or consider options. _____
17. Obtain death certificates – ask attorney how many are needed. _____

18. Death Notifications to make:

- a. Social Security Benefits _____
- b. Department of Veterans Affairs _____
- c. Medical Insurance Companies _____
- d. Life Insurance Companies _____
- e. Retirement/Pension Companies _____
- f. Decedent's Employer _____

19. Notify regular insurance agent about fire, theft, and public liability insurance on decedent's assets. _____

20. Review credit cards and charge accounts/cancel as appropriate. _____

21. Obtain valuations of assets, as needed. _____

22. Meet with accountant to prepare decedents last income tax return and/or a fiduciary income tax return. _____

HIRE ATTORNEY TO ASSIST WITH THE FOLLOWING:

1. Review and analyze the Will and/or Trust. _____

2. Probate the original Will with the Court and have Personal Representative (Executor) appointed and obtain short certificates. _____

3. Review estate administration process and procedures. _____

4. Evaluate joint tenancy assets to determine inheritance tax liability and retitling. _____

5. Inventory safe deposit box. _____

6. Assist in collection of insurance, wage claims, retirement benefits. _____

7. Guide and counsel the Personal Representative in administering the decedent's estate, including: _____

- a. Opening estate bank account
- b. Locating and valuing assets

- c. Notice to PA Department of Welfare (if deceased was 55 or older)
 - d. Obtaining estate identification number and determining fiscal year
 - e. Sending legal notices to heirs and beneficiaries; publishing estate notices
 - f. Notices (with death certificates/short certificates) as appropriate to deceased's banks, brokers, post office, credit cards, annuities and IRAs as needed
 - g. Inventory of assets
 - h. Gathering all claims and bills and paying according to statutory priorities
 - i. Preparation of inheritance tax returns, estate tax returns, and accountings
 - j. Timing of distributions and closing estate
8. If trust is involved, assist with trust administration and appropriate _____ distribution.
9. Review with family members the impact of decedent's death on their own estate planning. (Redraft wills, trusts, make gifts, review documents). _____

*FOR MORE INFORMATION OR ASSISTANCE, PLEASE CONTACT ATTORNEY
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