

Beginning the Estate Planning Process

Checklist for After a Death

This publication is a basic checklist following the death of a loved one. It is not intended to be an exhaustive list and does not have to be carried out in the order listed as it will depend on each unique circumstance.

- Pronouncement of death. If death occurs where authorities are involved, such as an accident, hospital stay, or hospice care, assistance will be provided with this. In instances where supports are not in place, such as a passing at home, call 9-1-1 for assistance.
- Determine whether the person wished to be an organ donor or make the decision. Visit organdonor.gov for resources.
- Arrange transportation to a funeral home, cremation provider, or location for assistance with final arrangements.
- Arrange accommodations for dependents and pets of the deceased.
- Contact family and friends. Ask others to help make these phone calls. Social media is a common announcement method. If you hire funeral home services, they may help as well.
- Contact the person's employer or school and clergy, if applicable. If deceased was retired but had a long-time employer, you may wish to contact them.
- Arrange the funeral or other final arrangements using the decedent's wishes if known or able to locate. Prepare the eulogy and obituary if part of the final event.
- Find any legal documents such as a will, trust, last letter of instruction, funeral or burial documents, insurance policies.
- Secure assets, such as home, valuables, property, or digital assets. Clean out the refrigerator, take care of plants, forward mail, take the trash out.
- Create an inventory of assets.
- If deceased received a pension or benefits from an employer or a service provider such as federal, state, military, or other employer, check to see if there are survivor or final expenses benefits.
- Contact relevant agencies such as US Veterans Affairs or Kansas Commission on Veterans Affairs for military service, and contact Social Security to see about benefits or to report the death. Social Security may be contacted by the funeral home you hire.
- Order death certificates. The funeral home may also order death certificates, or they can be ordered from the state office of vital statistics.
- Collect necessary paperwork such as birth, marriage and divorce certificates, deeds, titles, DD214(military discharge papers), safe deposit box, creditors, account information to pay bills/close accounts, and financial records.

- Contact the decedent's accountant/tax preparer if needed. Consider filing a final tax return.
- May wish to make creditors and the three credit reporting bureaus aware of the death.
- Contact any life insurance policy provider to begin the process of filing a claim. The death certificate and other documentation may be needed.
- Contact an attorney if needing information or assistance for settling the estate, including if there is any disagreement on who will be the executor.
- Update any estate planning documents if your loved one was a beneficiary.
- Be gentle with yourself and allow yourself to grieve.

Following a death, settling an estate can take anywhere from a few months to years, depending on the complexity. Whomever becomes the executor of the estate should consider establishing early expectations for potential heirs as to the sometimes-lengthy process of settling an estate. Executors act legally and ethically in putting the interests of the estate above their own, also known as acting in a fiduciary capacity.

Other K-State Research and Extension supporting publications:

- MF3467, Beginning the Estate Planning Process Overview
- MF3280, Advance Healthcare Planning in Kansas
- MF3122, Decisions After Death: Funeral Expenses
- MF3123, Decisions After Death: Practical Suggestions Regarding Financial and Legal Matters

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