

**CHECKLIST
THINGS TO DO WHEN A PERSON DIES**

Place an " X " in the left column when item has been completed	
	Notify immediate family and close friends
	Evaluate the emotional impact on the surviving spouse, children and close relatives and friends; arrange for support
	Deal with donation of bodily organs to an "organ bank," as appropriate
	Arrange care for dependents, if any
	Notify attending physician or coroner
	Arrange care for pets, if any
	Evaluate the need for security at Decedent's residence
	Cancel or rearrange home deliveries?
	Have Post Office hold mail?
	Find perishable property (food, plants, etc.), arrange for care or disposal
	Find and review Decedent's expressed funeral and burial wishes
	Notify agent under any power of attorney
	Prepare and arrange for obituary
	Arrange for mortuary, cemetery, burial, cremation, as appropriate
	Arrange funeral/burial services
	Notify other members of family and friends
	Keep records of all payments for funeral and other expenses
	Locate safe deposit box(es); follow safe deposit box procedures (see page 2)
	Locate wills, codicils, trusts
	Locate life insurance policies
	Locate other important documents, relationships, accounts, investments, etc.
	Advise Social Security, Medi-Cal, other agencies as appropriate
	Investigate social security benefits
	Investigate life insurance
	Investigate union death benefits
	Investigate veterans burial allowance and other benefits
	Investigate fraternal organizations

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	Investigate employee benefits, including accrued vacation pay, death benefits, final wages, retirement plans, deferred compensation, medical reimbursements,
	Investigate refunds on insurance or canceled subscriptions
	Investigate Keogh and IRA accounts
	Investigate business, partnership and investment arrangements
	Retain and meet with attorney regarding estate matters
	Retain and meet with CPA as to tax and accounting matters
	Meet with life insurance agent to collect proceeds or consider options
	Obtain death certificates (ask attorney how many are needed)
	Deal with fire, theft, liability and auto insurance on Decedent's property
	Work with attorney and CPA to prepare inventory, list of accounts and list of debts
	Review credit cards and charge accounts, cancel as appropriate
	DO NOT pay any of Decedent's debts until attorney discusses with family or executor
	Obtain valuations of assets, as appropriate
	If Trust involved, arrange for any allocations and transfers
	Arrange for final income tax return and estate tax return, as necessary

Safe Deposit Box Access Procedures

Suggestion: If there is any danger of a will or trust contest, or a conflict between executor, trustee, family or beneficiaries, DO NOT go to safe deposit box without the involvement of an attorney experienced with estate administration.

Owner(s) Deceased: California Probate Code § 331 authorizes a person who has the key to a safe deposit box of a deceased person to have access to the box, even before any action has been taken with the probate court. The financial institution shall first obtain proof of the decedent's death and reasonable proof of the identity of the person seeking access. The person may then:

1. open the box (under the supervision of an officer or employee of the financial institution),
2. make an inventory of the contents,
3. remove instructions for disposition of the decedent's remains, and
4. after copies have been made and placed in the box, remove wills and trust instruments.

Except for the disposition instructions, wills and trust instruments, no other contents shall be removed under these provisions. The person shall deliver all wills found in the box to the clerk of the superior court, and mail or deliver a copy to the person named as executor.

Surviving Co-Owner(s): Surviving Co-Owners have the right to access, as provided in their agreements with the financial institution. When accessing a safe deposit box after the death of a co-owner:

1. At least two people should be present at the first opening, and should make an inventory of the contents in detail on letter size paper, with both persons signing and dating the paper.
2. After copies have been made and placed in the box, remove documents as needed.