FOCUS ON THE FAMILY™
Planned Giving

After Death

Administrative Checklist

	1st Few Weeks	1-3 Months	6-12+ Months
Final Arrangements			
☐ Notify family and friends of loved one's death	●		
☐ Search for pre-planned final arrangement instructions left by deceased loved one	●		
☐ Search for organ donation instructions (driver's license, donative agreements, statements of intent)	●		
☐ Contact clergy for memorial service and notification of loved one's church family	●		
☐ Contact funeral home	●		
☐ Contact VA if military ceremony and/or burial is desired	●		
☐ Order certified death certificate with funeral home - 12+ copies (or 1 for each asset holding plus 4)	●		
☐ Consider appropriateness of direction memorial gifts in lieu of flowers to loved one's special charities	●		
☐ Complete funeral and burial arrangements	●		
☐ Contact local newspapers regarding obituary listing	●		
☐ Request local friends or neighbors to help with pets, mail, house upkeep, if necessary	●		
☐ Contact post office to forward mail, if necessary	●		
☐ Handle memorial gift thank you communication		●	●
☐ Other:			
☐ Other:			
Legal Matters			
☐ Contact life insurance companies to begin claims process	●		
☐ Contact deceased loved one's attorney and schedule an appointment	●		
☐ Locate wills or trusts (often kept at attorney's office or at home); check document finder listing	●		
☐ Meet with attorney to review will or trust provisions and the legal process necessary to administer these	●		
☐ File Will with court in the county of the deceased loved one's residence & open "probate" if necessary	●		

	1st Few Weeks	1-3 Months	6-12+ Months
☐ Prepare a summary ("inventory") of all deceased loved one's assets and liabilities	●		
☐ Notify loved one's creditors and provide contact information of personal representative (PR) or trustee		●	
☐ Notify beneficiaries of their beneficial interest in the estate and the proposed timeline for distributions		●	
☐ Contact employer benefits department to claim and/or discontinue benefits		●	
☐ Contact social security to claim and/or discontinue benefits		●	
☐ Contact VA to claim and/or discontinue benefits		●	
☐ With attorney assistance, obtain new tax id number for estate or trust		●	
☐ Obtain date of death values for every asset owed by deceased loved one		●	●
☐ Carry out any buy-sell agreements related to any closely-held business owned by deceased loved one		●	●
☐ Make necessary arrangements to protect and care for deceased loved one's property to preserve asset value		●	●
☐ Pay Bills and creditors		●	●
☐ Other:			
☐ Other:			

Financial Matters

☐ Notify family and friends of loved one's death	●		
☐ Contact bank to stop automatic deposits and withdrawls with deceased loved one's accounts		●	
☐ Review (or create) a cash flow budget for surviving spouse if needed and helpful		●	
☐ Meet with financial advisor to discuss investment strategy and cash flow needs		●	
☐ Other:			
☐ Other:			
☐ Other:			

Tax Matters

☐ Contact accountant to schedule a meeting to discuss deceased loved one's tax matters	●		
☐ Meet with accountant & discuss necessary tax return preparation		●	
☐ If necessary, have accountant prepare and file federal estate tax return		●	
☐ If necessary, have accountant prepare and file state inheritance tax return		●	
☐ If necessary, have accountant prepare and file deceased loved one's final income tax return		●	
☐ If necessary, have accountant prepare and file estate's and/or trust's fiduciary income tax returns		●	
☐ Other:			
☐ Other:			

Disclaimer: This is intended as general educational information. Focus on the Family does not provide legal, tax, financial or other professional advice. Focus on the Family recommends that you contact an attorney to advise you on specific responsibilities that will be necessary in administering your loved one's estate.