

# WASDIN

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## LAW LLC

### ESTATE AND PROBATE CHECKLIST: WHAT TO DO WHEN A LOVED ONE DIES

1. Contact the funeral director. Be prepared to give the following information for the death certificate:
  - a. Full name of deceased
  - b. Date and place of birth
  - c. Nationality
  - d. Occupation
  - e. Social Security number
  - f. Marital status
  - g. Full name of parents, siblings, and other survivors of deceased (including mother's maiden name)
  - h. Full name of previous spouse(s)
2. Make funeral arrangements with funeral director:
  - a. Specify when family members will be available
  - b. Select calling hours
  - c. Choose cremation, body donation, memorial service, burial service
  - d. Select transportation (number of cars, limousines)
  - e. Expenses may include: coffin, flowers, clergy, honorariums, newspaper notices, use of church, clothing, funeral home space rental, certified death transcripts, opening the grave, cemetery plot, grave marker, cremation, and transportation.
3. Contact spiritual advisor/clergyman:
  - a. Specify when family will arrive
  - b. Plan service including music selection and poems
  - c. Provide biographical information
  - d. Ask his or her choice of time for services
4. If desired, contact local newspaper to publish obituary.
5. Locate cash to take care of immediate needs. Sources of cash include:
  - a. Cash on hand
  - b. Savings accounts
  - c. Checking accounts
  - d. Money market certificates
  - e. Life insurance cash value
6. Locate important papers, for example:
  - a. Life insurance policies
  - b. Accidental death and health insurance policies
  - c. Homeowner insurance policies
  - d. Notes receivable and notes payable
  - e. Real estate deeds
  - f. Will and any Codicils
  - g. Income tax return forms, W2 forms, and other records of earnings

- h. Marriage certificate
  - i. Social security number
  - j. Birth certificates of all family members to prove ages
  - k. Military records
  - l. Automobile registration
  - m. *Likely places to search for important papers are:* Safety deposit boxes, Brief cases , Strong boxes, Office desk, Safes
7. Obtain copies of these papers:
- a. Death certificates (need at least 15 copies)
  - b. Birth certificate
  - c. Marriage certificate
  - d. Social security card
8. Contact attorney immediately so he or she can:
- a. Probate will. Be prepared to provide: the original Will and all Codicils, a copy of the death certificate, and names and addresses of heirs.
  - b. Provide applicable legal advice.
9. Contact CPA for guidance on all tax matters related to the estate.
10. Contact financial advisor to provide guidance on handling monies received from the estate, if applicable.
11. Contact life insurance agents:
- a. File a claim using death certificate or attending physician's statement for proof of death
  - b. Supply information including policy number(s) and amount(s), full name and address of deceased, deceased's occupation and date last worked, date and place of birth, date, place and cause of death, claimant's name, age, address, and social security number
  - c. Your settlement options might include:
    - i. Lump sum: you may immediately be paid a lump sum
    - ii. Interest only: principal stays intact, interest paid periodically good temporarily while you decide what to do with the money:
    - iii. Life income or annuity: beneficiary receives stipulated benefit on set dates for the lifetime of the claimant
    - iv. Fixed installments: benefits are paid in agreed amounts over a period of time until the money is used up
12. Contact your nearest Social Security office to apply for spouse and dependent benefits. Bring the following information:
- a. Certified copy of death certificate
  - b. Deceased's social security number
  - c. Proof of age of deceased
  - d. Marriage certificate
  - e. Approximate earnings of deceased in year of death;
  - f. Deceased's employer's name

- g. Record of deceased's earnings in year prior to death (use W 2 forms or self employment tax return)
  - h. Social security number of spouse and dependent children
  - i. Proof of age of spouse and dependents (birth certificate, baptism certificate or grade school records if no birth certificate)
13. Contact all financial institutions where decedent held accounts to notify them of the death and initiate account closure/distribution procedures.
14. If necessary, desired or pursuant to the Will, consult a real estate professional regarding the lease, sale or refinance of any real property owned by decedent.

***Remember, we can help. Call Wasdin Law LLC for a free 15 minute consultation.***

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