

# WHAT TO DO WHEN A LOVED ONE PASSES

It may be difficult to think of everything that needs to be done after someone's death.  
This suggested list of actions and contact information can help.

## First Two Days

- ☐ Notify family, friends, the deceased's employer, and clergy

**Employer contact:** \_\_\_\_\_

- ☐ Arrange care for dependents and pets, if any
- ☐ Collect important documents such as will, trust, and insurance policies
- ☐ Find and review the deceased's expressed funeral and burial wishes, if applicable
- ☐ Arrange funeral/memorial services
- ☐ Prepare and arrange for an obituary
- ☐ Contact the deceased's financial professional

**Financial advisor contact:** \_\_\_\_\_

## First Month

- ☐ Ensure regular payments are made on loans, mortgages, property taxes, and bills

**Home lender contact:** \_\_\_\_\_

**Mortgage/Loan accounts:** \_\_\_\_\_

- ☐ Bring the will to an attorney or local courthouse for review and approval
- ☐ Obtain any legal documents necessary to act on behalf of the deceased
- ☐ If the deceased had ownership in any small businesses or partnerships, consult with attorneys of the firm

**Lawyer/law firm contact:** \_\_\_\_\_

- ☐ Notify Social Security, Medicare, Veterans Administration, and other agencies,
- ☐ Speak with financial institutions about closing or maintaining credit and investment accounts

**Financial institution/investment firm contact:** \_\_\_\_\_

**Account number(s):** \_\_\_\_\_

- ☐ Prepare federal and state income tax returns for the estate

## First Week

- ☐ Obtain a supply of official copies of the death certificate, enough for legal and financial transactions
- ☐ Contact the deceased's employer about pay and other benefits

**Employer contact:** \_\_\_\_\_

- ☐ Start the claim process. If the deceased had a life insurance policy with Prudential, ask about services that can help you, including funeral payment, accelerated claims, asset protection, professional assistance, and more

**Life insurance contact:** \_\_\_\_\_

## In Two to Three Months

- ☐ Create an inventory of income, assets, and liabilities
- ☐ Change ownership of assets such as homes, vehicles, and related insurance policies
- ☐ Cancel the deceased's driver's license
- ☐ Notify the election board

## In Six to Nine Months

- ☐ Create an investment strategy. For assistance, find a Prudential Financial Professional
- ☐ Update existing accounts for which the deceased is listed as beneficiary
- ☐ Identify new beneficiaries for recently acquired accounts
- ☐ Continue settlement of the estate

