



Following an unexpected death

- Contact a trusted friend or family member to help with items on your task list.
- Arrange for childcare and petcare for the next several days.
- In a notebook, write down dates and names of officials, creditors, and service providers whom you have conversations with. Keep notes of the conversations as well as contact information for each person.
- Make a list of family members to be notified.
- Choose a funeral home. They will be able to walk you through much of the processes in the coming days.
- Ask a trusted person to help with funeral arrangements including reception and food, beverages, etc. if desired.
- Write the obituary. The funeral home can help with this detail.

- Ask a trusted person to help field and respond to comments on social media and local media, if needed.
- Identify potential needs or tasks that can be done when other family and friends offer help (grocery shopping, yard maintenance, repairs, cleaning, childcare, petcare, etc).
- Order at least 10 extra copies of the death certificate for banks and insurance companies.
- Gather official documents such as: social security card, will or estate plan, birth certificate, marriage license, military discharge documents, insurance policies, bank statements, etc.

Agencies to notify

- Social Security Administration
- Department of Motor Vehicles - They can help prevent identity theft
- All 3 credit reporting agencies (Equifax, Experian, TransUnion)
- Any creditors, banks, and open accounts
- Insurance companies
- Employer - make sure to inquire about pensions, 401(k) plans, insurance policies, benefits, and final paycheck.
- Schools of all children in the family
- Post Office
- Trust/estate attorney to begin probate process