

The document provides a checklist for managing affairs after the death of a loved one, emphasizing that it is not exhaustive and should not be considered legal, financial, or tax advice. It is recommended to consult qualified professionals for specific needs. Key tasks include obtaining multiple certified copies of the death certificate, planning the funeral, placing an obituary, notifying key contacts such as family, employers, and insurance providers, and arranging care for dependents and pets. It is important to secure the deceased's property and valuables, inventory the estate, and locate essential documents like wills, insurance policies, and financial accounts.

Additionally, notifying advisors and financial institutions is crucial, including freezing accounts to prevent unauthorized access. The document advises contacting the Social Security Administration to avoid overpayment and to check on benefits, as well as managing health insurance for surviving dependents. Settling financial and estate matters involves working with an estate attorney, ensuring timely payment of ongoing expenses, and claiming life insurance benefits.

The checklist also includes filing the deceased's final income tax return, applying for survivor benefits, updating titles and deeds, and evaluating insurance policies. It suggests updating estate plans and reassessing financial needs with a planner. Closing remaining accounts, notifying credit bureaus, and considering long-term support systems are also recommended. Finally, the document highlights the importance of completing estate settlement and distribution according to the will or trust, and provides resources for further assistance, including legal help and support for families of service members. A glossary of key terms related to estate management is included for clarity.