

Vsy Accountancy Corporation

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WHAT TO DO WHEN A LOVED ONE DIES

(Place "X" on left side when done, cross out if not applicable)

What To Do Immediately:

- O1 Gather family members. Plan, organize, delegate. Agree on main contact person.
- O2 Prepare lists of records to gather, tasks to do, people to contact. Establish responsibilities.
- O3 Establish dates & locations of
 - OA Viewing _____
 - OB Interment _____
 - OC Reception _____

Who To Inform:

- O1 Family members _____
- O2 Close friends _____
- O3 Employer _____
- O4 Trustee, executor _____
- O5 Pastor, minister, priest, rabbi _____
- O6 Doctor, attorney, accountant _____
- O7 Life insurance agent _____

What To Bring For Funeral Arrangements:

- O1 Photograph that shows hairstyle. _____
- O2 Memorial tablet inscription _____
- O3 Birth certificate. _____
- O4 Before-need contract. _____
- O5 Military discharge papers. _____

What To Select:

- O1 Memorial park _____
- O2 Casket/vault _____
- O3 Memorial tablet _____
- O4 Photo for embalmer. _____
- O5 Photo to be enlarged for services _____
- O6 Clothing for deceased _____
- O7 Clothing for family members _____
- O8 Casket bearers _____
- O9 Speakers at service _____
- O10 Scriptures & readings _____
- O11 Photographer _____
- O12 Videographer _____
- O13 Music _____
- O14 Flowers _____

What To Do After Burial:

- O1 Gather records. _____
- O2 Meet with lawyer _____
- O3 Meet with CPA _____
- O4 Meet with insurance agent _____
- O5 Visit nearest social security office _____
- O6 Identify special needs of family members. _____
- O7 Plan to safeguard assets especially life insurance proceeds. _____
- O8 Get 10 to 20 copies of death certificate. You'll need more certificates than you think. _____

What Records To Gather:

- O1 Living trust, last will & testament, and other estate documents. _____
- O2 Life insurance policies. _____
- O3 Latest bank statements – savings, checking, CD. _____
- O4 Latest broker statements - stocks and bonds. _____
- O5 IRA, 401k, SEP, annuities, and other retirement docs. _____
- O6 Real estate deeds, property tax bills, mortgage statements. _____
- O7 Vehicle registration, ownership certificates and related loans/leases. _____
- O8 Receivables – promissory notes and other loan statements. _____
- O9 Payables – credit cards and other loans payable. _____
- O10 Social security numbers of deceased, spouse, children < 18 (or 19 if in high school). _____
- O11 Birth certificates of deceased, spouse, children < 18 (or 19 if in high school). _____
- O12 Marriage certificate. _____
- O13 Citizenship papers. _____
- O14 Social security statements. _____
- O15 Death certificate (about 5 copies). _____
- O16 Latest wage statement W2 or income tax return 1040. _____
- O17 Safety deposit box location or key. _____
- O18 Corporate, LLC, & partnership records (articles, tax returns). _____

Social Security: Tel (800) 772-1213, Website www.ssa.gov.

- O1 Social security numbers of deceased, spouse, children < 18 (or 19 if in high school). _____
- O2 Birth certificates of deceased, spouse, children < 18 (or 19 if in high school). _____
- O3 Marriage license. _____
- O4 Death certificate (about 5 copies). _____
- O5 Latest wage statement w2 or income tax return 1040. _____

Who To Pay:

- O1 Hospitals, doctors, & other expenses of last illness. _____
- O2 Memorial Park for lot, tablet, interment. _____
- O3 Gratuity for minister. _____
- O4 Florists, photographer, videographer, musicians. _____

In Conclusion:

- O We are never prepared for the death of a loved one, but being strong helps us through difficult times.
- O This is a time to comfort one another, a time to forgive, a time to heal wounds.
- O Your loved one is being put to rest, let family disputes and conflicts also be put to rest.
- O For other families, this is the start of bitter quarrels over inheritance. Don't let this happen to your family.
- O It is okay to cry, to vent. This is normal.
- O It is okay to have feelings of guilt: we didn't do enough, we could have done more. This, too, is normal.
- O It is okay to be angry – even with our loved who passed away. It's okay to express such anger harmlessly.
- O Bring out any unfinished business with the loved one that you lost. Find ways to bring it to closure.
- O You may feel like withdrawing from people. Use this time of solitude in a positive way to take care of yourself.
- O Try not to isolate yourself for long periods of time.
- O Time heals. It may take some awhile, but time does heal. You'll see.

Your Personal Notes:

- O _____
- O _____
- O _____
- O _____
- O _____
- O _____
- O _____