

THE *Checklist*

A GUIDE TO SIMPLIFY WHAT
NEEDS TO BE DONE
AFTER A LOVED ONE PASSES AWAY

WILLOW WOOD SOLUTIONS



Sincere condolences...

When someone you love passes away, it's easy to get overwhelmed with all the things to do and people to call while feeling all the emotions.

Maybe you found this list online, or someone thought it would help you. However it came to be in your hands, and before we dive into what's here, please accept my condolences.

I usually write about wills, probate, and estates, but this list is more personal. It's for someone like you who recently lost a loved one. It's adapted from an article on my blog. My hope is that this list of ideas and practical tips will simplify things for you, and encourage you as you get important things done.



Willow Wood Solutions is here to support people going through life transitions, especially probate. If you live in the greater Houston area or face probate anywhere in the U.S. and need assistance, let us know. We'll do all we can to get you the help you need.

Sincerely,

Sherri Lund

Sherri Lund
Owner, Willow Wood Solutions

PS: You can find the full article mentioned above on our website, www.willowwoodsolutions.com. It's entitled, "*Top 10 Smart Things You Need To Do Immediately After Someone Dies: And ONE Thing You Must NOT Do.*" In addition to this checklist, you can find other resources and articles to help you navigate this season in life.

A Checklist of What to Do After Someone Passes Away:

Ten important things to do after someone passes away and one thing to avoid.

1. APPROVE ORGAN DONATION.

- This is time sensitive. Notify the hospital immediately if this was something the deceased wanted.

2. SEE THAT ANY DEPENDENTS AND/OR PETS ARE CARED FOR.

- Children
- Dependent Adults
- Pets

3. NOTIFY CLOSEST FAMILY, FRIENDS, AND CLERGY.

- The American Red Cross can help locate people in the military.
- Contact a grief counselor if one is needed.

4. LOCATE IMPORTANT PAPERS.

- Look for a will or trust in a file cabinet, personal safe, or safe deposit box.
- Look for instructions for funeral, burial, or cremation.
- Look for passwords for accounts and digital platforms.

5. REMEMBER TO REMINISCE.

- Take time to look at photos, tell stories, and let others tell theirs.
- You might start a journal to capture your thoughts and feelings.

6. CONTACT THE ATTORNEY AND EXECUTOR OF THE ESTATE.

- Notify all power of attorney agents and trustees of the death.
- Ask if they know some of the deceased last wishes.

A Checklist, continued...

7. BEFORE VISITING THE FUNERAL HOME, DETERMINE IF BENEFITS ARE AVAILABLE.

- Benefits may be available if the deceased was a member of certain organizations, in the military, or on public assistance.
- If the death was due to Covid-19, see if you qualify for FEMA help.

8. VISIT THE MORTUARY TO MAKE PLANS FOR FUNERAL, BURIAL, CREMATION, AND/OR END-OF-LIFE SERVICE.

- Invite someone supportive and practical to go with you.
- Prepare an obituary and schedule it.
- Consider a charity that people can donate to in lieu of flowers.

9. PROTECT, MANAGE, AND MAINTAIN THE PROPERTY.

- This includes a house, vehicle, business, furnishings, etc.
- Take photos of valuables (guns, jewelry, collections, etc.) and secure them.
- Make sure the mail is collected and newspapers picked up.
- Have someone stay in the house during the funeral service.
- If you're the Executor for the estate, consider changing the locks.

10. CONTACT EMPLOYERS, EXTENDED FAMILY, AND FRIENDS.

- Do this within a day or two of death. Benefits may be available.
- Notify extended family members and friends.

*****DO NOT ALLOW THINGS TO BE TAKEN FROM THE ESTATE UNTIL YOU HAVE PERMISSION. AND DON'T LET OTHERS TAKE THINGS EITHER.*****

This could affect the assets of the estate and have tax implications.