

AFTER DEATH GUIDE

Our team at Ishihara & Parker Law Firm, PLLC hopes that this After Death Guide can help provide some practical advice to you and your family during an emotional time:

- Secure the personal property of the deceased. Including wallet, jewelry and household items.
- Forward mail from the residence, or secure pick up by discussing with a neighbor.
- Obtain Death Certificates, 10-20 is often sufficient.
- Gather any documents for banks, financial institutions, life insurance, etc. and make a list of accounts and accounts numbers.
- Locate the Original Last Will & Testament.
- Begin to notify of death (you do not need a death certificate). If you are listed as a beneficiary, they will mail you claim forms:
 - Any banks;
 - Any financial institutions or financial advisors;
 - Life Insurance policies;
 - Any pensions received or other income received into bank account;
 - Supplemental Insurance;
 - Utilities – to cancel or update name;
 - Any other payments drafted from or paid by bank account.
- Social Security will be notified through the obtainment of a death certificate, however, if you are a surviving spouse you will need to make an appointment to make a spousal claim for benefits.
- Talk to a CPA about final personal return and any other tax filings.

**Make an appointment with Ishihara & Parker Law Firm PLLC
to determine whether probate is necessary**