

This folder may be left on a kitchen counter, dining table, or in a car. **Keep account numbers and passwords in a secure place. *Not in this folder!***

CHECKLIST FOR THOSE LEFT BEHIND

Your Personal Representative will need help. Use this To-Do list to record who might assist with what.

Divide up duties between your Personal Representative, family, neighbors, your accountant, and that nerdy friend who knows all about computers.

Please note who has agreed to do what. If the To-Do items listed below are not applicable please write N/A.

To-Do	Responsible Person	Phone Number Or Email Address	Notes	Date Completed
Keep cell phone in order to receive texts and emails for the TWO-STEP VERIFICATION PROCESS which is needed to change accounts.				
SECURE THE CELL PHONE				
WHAT IS THE PHONE'S PIN #?				
Secure other personal items (wallet, purse, jewelry, keyring, etc.)				
Secure home and vehicles				
Confirm next-of-kin is notified				
Confirm personal rep. notified				
Follow thru on organ donation (please note if organs are donor ineligible)				
Decide on body disposition				
Funeral Home arrangements				
Write and place obituary Keep it simple. Do not reveal info that scammers can use. Do NOT place on-line!!!				
Acquire Death Certificates (5-10)				
Track expenses as you proceed				
Notify deceased's employer(s)				
Other				

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Wi-Fi password. Your family will need it to find account info, google venues, and communicate via email on a computer.				
Notify friends				
Church/synagogue/mosque				
Plan service (if any)				
Decide on wake (if any)				
Plan burial / scattering of ashes To prevent a robbery - assign someone to stay at the house during visit hours/services				
Change voicemail message				
PERSONAL REPRESENTATIVE (EXECUTOR) WILL HAVE TO:				
Publish Notice of death				
Apply for estate tax ID from IRS				
Begin probate (if necessary)				
File IRS Form 56				
Gather estate planning docs:				
Locate will or trust				
File will in court within 10 days				
Open acct to hold \$ due estate				
Other				
Notify Social Security				
Notify the VA (if veteran)				
Notify DMV (cancel driver's license)				
Notify local election office				
Notify postal service (USPS)				
Other				

Start inventory of assets:				
Locate safe deposit box and key (if any)				
Locate personal documents (Passport, birth and marriage certs, etc.)				
Locate tangible valuables (Jewelry, coins, guns, gold, silver, bonds...)				
Locate online valuables (bitcoin, NFTs, documents, digital files, etc.)				
Locate bank account info (Might be more than one.)				
Find debit cards				
Cancel automatic withdrawals (Charities, clubs, insurance, loans, etc.)				
Locate Pension documents				
Locate life insurance policies				
Locate IRA info				
Locate 401K info				
Locate annuity contracts				
Locate info on CDs				
Locate other investments				
Locate Stocks (paper or online)				
Locate Bonds (paper or online)				
Closeout brokerage accounts				
Locate deed(s) for real estate				
Locate mortgage info (if any)				
Look for liens on property				
Locate car / golfcart / boat titles				
Locate motorcycle / RV titles				
Locate loan info (if any)				

Find credit cards:				
Return merchandise (if necessary)				
Pay Credit Card bills				
Close Credit Card accounts				
List here:				
Verify and pay claims against the estate: (Beware of contractors who see a death notice and then come forward with a bogus claim.)				
List verified debts:				
Collect money due estate				
Sell assets (as necessary)				
Stop automatic online pay - IRS				
Prepare tax returns				
Pay tax liabilities				
Request copies of credit reports (every quarter for an entire year)				
Cancel identity theft protection (after estate has been completely settled)				
Distribute assets to heirs				

Sort out insurance:				
Notify Medicare/Medicaid				
Notify 2nd health ins. provider				
Notify vision ins. provider				
Notify dental ins. provider				
Notify Rx ins. provider				
Cancel automatic refills (if any)				
Cancel upcoming doctor appt.s				
Notify doctors (do you need records - genetic disease info)				
Long Term Care Insurance				
Finalize all claims (May take a year)				
Sort out additional policies:				
Vehicle(s) (Car, truck, golfcart, boat, motorcycle, RV)				
Homeowners or Renters				
Property				
Liability (AKA Umbrella Policy)				
Follow up on claims (if necessary)				
Other:				
Utilities and Services:				
Change name on electric bill				
Change name on water bill				
Change name on garbage bill				
Change name on gas bill				
Notify phone service provider				
Notify internet / cable provider				

Cancel Technology Accounts:				
Close out nontangible accounts (PayPal, Apple Pay, Venmo, Zelle, etc.)				
Cancel SunPass, E-Z Pass, etc. (plus travel clubs, park passes - if any)				
Cancel streaming services (Netflix, ESPN, AppleTV, PBS, HBO, etc.)				
Gaming console subscriptions (PlayStation, Hulu Plus, Xbox, Sony, etc.)				
Cancel memberships with dues (SCCCA, Moose, AAA, Country Club, etc.)				
Look for hidden accounts (gambling, porn, drugs, illegal activity, etc.)				
Cancel amazon everything (cloud storage, streaming, automatic refills)				
Cancel Costco, Sam's, BJ's, etc. with associated credit cards				
Cancel shopping accounts without associated credit cards like: Bealls, HD, Etsy, Publix, Lowes, Kroger's, etc				
Close social media accounts (Facebook, Twitter, TikTok, Nextdoor, etc.)				
Close out other online accounts (e-Bay, YouTube, Craig's list, Bonanza, etc.)				
Manage online storage (iCloud, Google photos, Verizon Cloud, etc.)				
Keep or sell domain names				
Close out blogs				
Keep tract of warranty info (car, washing machine, AC, printer, etc.)				
Close maintenance contracts:				
Contact pest control services				
Contact cleaning services				
Contact lawn services				
Contact shrub trim services				