



## A Survivor's Checklist

*A helpful guide when a loved one passes*

**Please keep with your important papers**

<b>IMMEDIATE:</b>	
	Contact friends and relatives. <b>ALLOW YOUR FRIENDS AND RELATIVES TO HELP YOU OUT IN THIS TIME OF NEED.</b>
	Obtain signed death certificate and autopsy (if applicable).
	Within the first 24 hours, look for organ donation records. Check for signed authorizations and arrange immediately.
	Inventory safe deposit boxes and personal papers of the deceased. Look for burial insurance policies, prepaid mortuary or cremation society plans.
	Contact mortuary to make burial (or cremation) and funeral arrangements.
	Arrange for obituary notice.
	Make arrangements for pets (if any).
	Cancel regular elder assistance services, if any (such as Meals on Wheels).
	Obtain certified copies of the death certificate from the mortuary (consider purchasing 5 to 10 copies). Depending on the state, it may take a few weeks to receive.

<b>WITHIN 30 DAYS:</b>	
<i>If applicable, notify:</i>	
	Social Security Administration to stop checks. Funeral home may have already done this, verify with them.
	Appropriate agency if receiving health care benefits through a governmental program.
	Veterans Administration.
	Payers of Pensions (such as former employer), or annuities.
	Department of Motor Vehicles.
<i>What documentation to locate:</i>	
	Will
	Trust(s)
	Insurance policies
	Deeds to Real Estate
<i>If accounts have beneficiary designations, notify:</i>	
	Successor Trustee (Trust Manager) for eventual distribution of assets
	The Retirement Solution at 888.500.5830.

# A Survivor's Checklist

Page 2

Please keep with your important papers

	Insurance companies and arrange for any death benefits to be paid to beneficiaries.
	IRA and Pension companies for any death benefits to be paid to beneficiaries.
	Banks or brokerage companies with Transfer on Death (TOD) Accounts for any death benefits to be paid to beneficiaries.
<b><i>If NO Living Trust and ONLY a will, notify:</i></b>	
	County Clerk and deposit the original will within 30 days or confirm Attorney has completed.
	Executor to begin probate process with an attorney.
	The Retirement Solution at 888.500.5830 for review of possible death and/or income owing and assistance in sorting out and distributing assets.

## **WITHIN 60 DAYS:**

	Notify all creditors and utility companies.
	Transfer title on jointly held assets.
	Inventory personal effects and arrange for disposition to family members, friends, or charities.

## **WITHIN 6 MONTHS:**

***If surviving spouse:***

	Contact The Retirement Solution at 888.500.5830 for review of finances and revised financial plan.
	Update your will or trust.

*This material is for informational purposes only. It is not intended to provide legal advice or provide the basis for any financial decisions. You are encouraged to consult with an attorney before making decisions about your individual situation.*

Redmond Office  
Main  
425-558-3700

Seattle  
Office  
206-489-0700

Tri-Cities  
Office  
509-581-0249

Denver  
Office  
303-974-4978

**[www.theretirementsolution.com](http://www.theretirementsolution.com)**

18300 Redmond Way, Suite 100  
Redmond, WA 98052

*Investment advisory services and insurance services are provided through The Retirement Solution Inc., a Registered Investment Advisor. The general views outlined in this material are those of The Retirement Solution Inc. and should not be construed as individualized or personalized investment advice. This is for general information only and is not intended to provide specific advice or recommendations for any individual. To determine which investment(s) may be appropriate for you, consult your financial planner prior to investing. All performance referenced is historical and is no guarantee of future results. All indices are unmanaged and cannot be invested into directly. Any economic and/or performance information cited is historical and not indicative of future results. There is no guarantee that the strategies discussed will be successful. Risk accounts are Not FDIC Insured, Not Bank Guaranteed, May Lose Value, Not Insured by any Federal Government Agency and Not a Bank Deposit. The Retirement Solution Inc. is an investment advisor registered or exempt from registration in each state The Retirement Solution Inc. maintains client relationships.*