

Use this checklist and the resources identified below to help you navigate the steps you need to take to move forward if a parent has passed away.

1. Mark the items listed with a checkmark in the first box if it applies to your situation. (This is by no means a comprehensive checklist, and your situation may require additional steps.)
2. Assign a due date, if this applies to your situation.
3. Take notes as appropriate to your needs, and update as you complete items. Your notes may include other people you speak with, others who need to take action or new information you find.
4. If an item will incur costs, note the costs to keep track of your expenses.

Important Note:

If there is a surviving spouse (e.g., mother, father, or other), help that person do the things that are beneficial/required when a spouse dies. You may have to step in and provide guidance and direction on what to do depending on emotions and financial capabilities of a surviving spouse.

Do not push that person to make significant changes such as selling the home and moving. Allow time for grieving and developing a degree of equilibrium. Schedule family meetings to discuss the way forward to settle the estate (this may require professional assistance). Provide moral support for surviving spouse, other children and grandchildren. Encourage interactions with appropriate social service, religious and other support networks. Everyone will need time to think, reflect and get competent, qualified advice.

Many of the action items listed assume that you are in charge of executing the affairs of your parent. If you still have a parent living, you may need to work in conjunction with him or her to complete the items.

✓	ACTION ITEM	DUE DATE	NOTES	COST
	Get a copy of your parent’s will and make several copies. Note: in addition to the distribution of assets, wills also can specify what should be done with remains. Read the will carefully before making decisions.			



✓	ACTION ITEM	DUE DATE	NOTES	COST
	Gather all identifying certificates: birth, marriage or partnership, children's' birth, divorce, death (of prior spouse, if applicable), military discharge (if relevant for veteran's benefits), Social Security cards, etc.			
	Collect paperwork for all life insurance policies, annuities, 401(k) plans, IRAs and all other insurance, retirement and investment accounts.			
	Help the surviving spouse finalize funeral arrangements, guarding against overspending. Notify family and friends about the arrangements and write the obituary as necessary.			
	Request at least 10 certified copies of the death certificate through the funeral director or directly from the health department.			
	Contact your parent's employer to get relevant benefit information and to notify the employer of your parent's death.			
	If your parent has been receiving Social Security retirement benefits, contact the Social Security office right away to switch the payments to the surviving spouse and to lessen any confusion with existing or ongoing payments. Even if your parent was not receiving benefits, contact the Social Security office to find out about the death benefit and other benefits for which you may be eligible.			
	Contact the Internal Revenue Service (IRS) to notify them of your parent's death and determine what needs to be done to file taxes.			



✓	ACTION ITEM	DUE DATE	NOTES	COST
	Notify the Veteran's Administration, if applicable, to find out about survivor and funeral benefits.			
	Notify the election board of your parent's death.			
	Begin the process of probating the will through your parent's attorney (or your attorney if both parents are deceased).			
	Seek professional help to deal with tax, legal and other financial expenses and to file required forms and make payments as necessary (e.g., credit cards, mortgage, etc.)			
	Make sure necessary payments continue (e.g., utilities, insurance, mortgage, credit cards and other debt, car loans, etc.), and begin the process of helping to cancel accounts or redirect them into the surviving spouse's name. Don't forget about canceling the driver's license, along with memberships, emails and other web accounts. There may be final expenses to be paid to medical providers.			
	Follow advice from a financial professional to file a beneficiary claim for each insurance policy (as applicable) and investment/retirement accounts.			
	File claims with and/or cancel all other insurance policies, such as auto, credit, mortgage, etc.			



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	Retitle any jointly held assets, property or investment accounts, as appropriate to the will.			
	Cancel your parent's credit cards and other lines of credit. See Resources below to obtain credit reports for your parent.			
	Update beneficiary arrangements and provisions of a surviving spouse's will or your will.			



Other Resources:

COMPANY OR ASSOCIATION	WEBSITE	NOTES
AARP	What to Do When a Loved One Dies (http://www.aarp.org/home-family/friends-family/info-06-2012/when-loved-one-dies-checklist.html)	
U.S. National Library of Medicine	Bereavement (https://medlineplus.gov/bereavement.html)	
U.S. Social Security Administration	Survivors Benefits (https://www.ssa.gov/pubs/EN-05-10084.pdf)	
U.S. Department of Health and Human Services	National Institute on Aging End of Life Publications (https://www.nia.nih.gov/health/publication/end-of-life)	
National Caregivers Library	End of Life Issues (http://www.caregiverslibrary.org/caregivers-resources/grp-end-of-life-issues.aspx)	
VeryWell	Survivor's Checklist After Death (https://www.verywell.com/survivors-checklist-after-death-1132601)	
Annual Credit Report	AnnualCreditReport.com (https://www.annualcreditreport.com/index.action)	