

Amen, Gantner & Capriano

Your Estate Matters, L.L.C

Estate Planning and Elder Law Attorneys



Things to Do After the Funeral



- 1) Contact Estate Administration Attorneys
- 2) Inventory Assets (Check Titling)
- 3) If there is a Will, contact the executor and attorney to discuss any necessary legal process.
- 4) Notify your accountant or tax preparer.
- 5) Contact the deceased's employer and/or union.
- 6) Notify any credit card companies of the death. Inquire about any cash back or points rewards before cancelling the account. Also inquire of any insurance on these accounts that pay off any outstanding balance.
- 7) Notify banks, investment companies, and pension or retirement accounts.
- 8) Call your car insurance company. Lower rates may be available for the surviving spouse.
- 9) Update your life insurance policies. You may need to change the beneficiary of your own life Insurance.
- 10) Stop coverage for the deceased on any health insurance plans. Some companies have a death benefit rider, so make sure you ask when you contact them.
- 11) Send thank you notes to those who sent flowers, made a memorial donation or showed a special act of kindness.
- 12) Contact a monument company for the purchase of a headstone or the placing of the final date.
- 13) Filing a final 1040 individual tax return, due on April 15th following the year of passing.
- 14) Filing of the Last Will and Testament within one year of passing.
- 15) Filing a 706 Estate Tax Return within nine months of the date of death, when applicable.
- 16) Taking a required minimum distribution from a retirement plan.
- 17) Apply to the Internal Revenue Service for a tax identification number of trust or estate.
- 18) Notify financial institutions of the passing of the decedent to adjust the cost basis of record and or new trustees.
- 19) File a 1041 income tax return for the trust or estate due on April 15th for calendar year taxpayers.
- 20) Publish a notice to creditors to limit the statute of limitations for unknown creditors.