



Mundy Legal Services, PLLC

ATTORNEYS AND COUNSELORS AT LAW  
500 W. Main Street  
Tomball, Texas 77375  
Tel (281) 466-4469  
Fax (281)-547-7514

## **PRIORITY ACTIONS AFTER A DEATH OCCURS**

### **IMMEDIATELY**

Notify your family and close relatives. Assign family members who can help do the necessary things in a way that match their strengths and if ask they want to be included in the details to assist. Notify your Pastor, church family, and friends. Do not post anything until immediate family members have been notified.

Set up a Notebook/Folder to keep all information you locate in one place. As you make calls or lists, for people bringing food, cards, letters, etc. You will have these notes all together, later when you arent sure you have contacted someone, or who is responsible for doing what.

Contact the funeral home, medical school, cremation, according to the deceased wishes. Take someone with you, as your emotions and sentiments will be high, as based on your loved ones wishes in their Will, and the funds available will need to be in consideration as decisions are made. The funeral home will help you arrange for the Services, order flowers, car, details for the funeral. Order at least 20 death certificates, you will need these later for proof.

Locate pictures, choose readings, songs, and people who may have roles in the services, Make a list of family survivors and choose details of the services with the funeral home, if applicable.

Write an obituary for the newspaper or to be posted in social media. A family member may wish to take this burden from you. Do not post this until all family members have been notified.

Notify the person's employer, children's school, daycare or church.

Locate the Will, and any trust documents. This will give you an understanding of the wishes of the loved one, if you did not know.

Do not make any quick decisions on possessions and personal items, to get gotten rid of or changed, this can be dealt in the later weeks.

### **IN THE FIRST WEEK**

Contact the Social Security Administration Office to notify them of the death. You will need their social, date of birth, and full name.

Notify all three national credit reporting agencies Experian, Transunion, and Equifax. You may need to follow up with a letter or copy of the death certificate and a formal letter. However, call first to notify the agencies to stop any other activities from being added or deleted to the deceased account. This will be done immediately. You will need their social, date of birth, and full name when speaking with the agencies.

Gather all important papers. Gain access to the contents of the safety deposit box. Locate the passwords and keys to all.

You already have the Will and trust documents, but locate birth certificate, adoption papers, marriage or divorce papers, drivers license, tax returns, military, employee benefits, pensions, 401k's, IRA's, insurance policies, titles to the home and car, any assets and titles.

Notify the above of the deceased passing. This may involve a call or a formal letter. You may have to complete a form and supply a death certificate. A call would be wise first, and they would tell you what they require. This is why you would order so many death certificates with the funeral home in the first step.

Contact any life insurance policies, to start that process. Or contact your financial advisor.

Contact any professionals, attorneys, financial advisors, CPA's or tax accountants for guidance if needed.

Be sure to withdraw any Required Minimum distributions from the deceased retirement account. Your financial advisor would be able to assist you with this. Gather bank statements, medical bills, credit cards, life insurance communication, estate settlement and tax information.

File the Will with the help of an attorney and begin the probate process.

Follow up with Person's employer for any final payment due.

Do not cash any checks from the Social Security department that may have been sent for the deceased.

If collecting Veteran's benefits, you will need the person's military discharge papers and make an appointment with the local VA office.

Create a calendar to follow up on appointments, or to make a note if paying bills. If in a rented facility, make contact with the landlord for the next step of arrangements.

### **AS THE EXECUTOR WITHIN THE FIRST FEW MONTHS OF PROBATE**

Work on re-titling cars, house, safe deposit box, bank accounts, utility bills and credit cards.

Work with your CPA for filing an estate return and the final return and when to do so.

Cancel subscriptions, credit cards, bank accounts and register the person deceased on mailing lists.

Decide what to do with the deceased social media account, voice mail, cell phone, etc.

Gradually go through the loved one's possessions and decide what to do with them.

*Compliments of Mundy Legal Services, PLLC*