

# Survivor's Checklist

This information should be kept with The Family Financial & Estate Organizer and describes events to occur after a loved one's passing.

## 1

### IMMEDIATE



Things to be aware of:

- Are they set-up for Organ Donation?
- Is an autopsy necessary?

Locate burial insurance policies, prepaid mortuary, or cremation society plan. These should be included in the Family Financial & Estate Organizer.

Contact mortuary to make funeral and burial or cremation arrangements. Arrange for obituary notice.

Inventory safety deposit boxes, safe, Family Financial & Estate Organizer, and personal papers of the deceased.

Contact friends, relatives, religious organizations, doctor, employer/business partners and your advisor. Allow them to help you out in this time of need.

Make arrangements for dependents and pets, if any. Cancel regular elder assistance services, if any. (Meals on Wheels, mail prescriptions, etc.)

Secure deceased's home and remove valuables.

## 2

### WITHIN THE NEXT 30 DAYS



Contact us at [Planable Wealth](https://www.planablewealth.com) at **951.900.8850** to schedule a meeting to begin creating your family legacy plan.

Bring your Family Financial & Estate Organizer:

- Locate the documents such as Will(s), Trust(s), insurance policies, and deeds to real estate (should be in the Family Financial & Estate Organizer).

We will assist in:

- Number of certified death certificates needed
- Social Security Administration to stop checks
- Health Insurance/Medicare Policies
- Veterans Administration
- Payers of any pensions or annuities
- DMV
- Notifying all three credit agencies (see back page for contact info)
- Insurance companies to arrange for any death benefits to be paid to beneficiaries
- Coordinating with tax preparer on death and/or income taxes owed
- Financial Institutions / IRA and pension companies to determine payout strategies and options
- Coordinating with Attorney, if necessary

If there was a Living Trust, Contact:

- Successor Trustee (listed in Trust documents) to have them attend your family legacy planning meeting.
- Estate Planning Attorney if necessary

## 3

### WITHIN THE NEXT 60 DAYS



We will continue to assist:

- Notify any creditors and utility companies with you
- Transfer title on jointly held invested assets

Inventory personal effects and arrange for disposition to family members, relatives, or charities

## 4

### WITHIN THE NEXT 6 MONTHS



Contact Planable Wealth at **951.900.8850** to:

- Review finances
- Replace lost pension or Social Security benefits.
- Create or revise your family's financial plan



### IMPORTANT CONTACT INFORMATION



PLANABLE WEALTH  
**951. 900. 8850**  
[info@planablewealth.com](mailto:info@planablewealth.com)  
[www.planablewealth.com](http://www.planablewealth.com)

DEPARTMENT OF VETERAN'S AFFAIRS  
**800. 827. 1000**  
[www.vba.va.gov](http://www.vba.va.gov)

SOCIAL SECURITY ADMINISTRATION  
**800. 772. 1213**  
[www.ssa.gov/benefits/survivors](http://www.ssa.gov/benefits/survivors)



### CREDIT REPORTING AGENCIES



EQUIFAX  
**800. 685. 1111**  
[www.Equifax.com](http://www.Equifax.com)

TRANS UNION  
**800. 888. 4213**  
[www.TransUnion.com](http://www.TransUnion.com)

EXPERIAN  
**888. 397. 3742**  
[www.Experian.com](http://www.Experian.com)