In case of emergency...

Important Instructions After the Death of Your Loved One

This resource can be used as a checklist of tasks that you may need to complete after the death of your loved one. This is not an exhaustive list and there may be additional tasks that you will have to take because of your loved one's unique circumstances.

This resource is provided for informational purposes only and should not be construed as offering legal advice or creating an attorney-client relationship between the reader and the attorney or Cornerstone Legal PLLC. You should not act or refrain from acting on the basis of any information included on this resource without seeking appropriate legal advice from an attorney licensed in your state.

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Losing a loved one is difficult enough without all the administrative tasks that arrive at your doorstep. Even if your loved one established an Estate Plan, whether with a Will or Trust, there are still a number of tasks that may need to be completed after they have passed.

First and foremost, you should always focus on you and your family and give yourself the permission and space to grieve. No matter how important or demanding a task may seem, healthy grieving is always the priority. If you need support during this time, here are a few great resources:



Ele's Place – Capitol Region
Healing center for grieving children, teens, young adults, and their families

https://www.elesplace.org/
517-482-1315
1145 W. Oakland Avenue, Lansing, MI 48915



GriefShare
Resource for local support groups and valuable guidance and tips

https://www.griefshare.org/
800-395-5755



Michigan 211
Grief and Bereavement Resources and Services

https://mi211.org/grief
Call 211
Text your ZIP code to 898211

CHECKLIST OF IMPORTANT TASKS

You may not have to complete every one of these tasks, but these are all common tasks that need to be completed after someone passes away. If you ever need assistance with these tasks, or others that may arise, we at Cornerstone Legal would love the opportunity to assist you with administration during this difficult time.

☑	TASKS
☐	FUNERAL PLANNING: locate any prepaid funeral/cremation contracts, burial plot deeds, or other prepaid arrangements.
☐	NOTIFICATIONS: contact the Veteran's Administration, if your loved one was a Veteran, and determine eligibility for military honors and/or VA benefits.
☐	NOTIFICATIONS: contact your loved one's friends and family.
☐	FUNERAL PLANNING: obtain death certificates – you will NOT need as many as you might think. Many places will accept a copy and you can always order more from the county later.
☐	SECURE PROPERTY: secure any real property owned by your loved one; consider changing door locks or keypad access codes, and securing garage door openers.
☐	SECURE PETS: secure your loved one's pet(s) and make arrangements for a caretaker; gather information about licensing, diet, and veterinary care.
☐	SECURE PROPERTY: secure your loved one's driver's license, credit/debit cards, checkbook, passport, social security card, birth certificate, marriage certificate, military records, etc.
☐	SECURE PROPERTY: secure your loved one's vehicle(s); locate all keys; make arrangements for storage of vehicle(s); return any leased vehicles.
☐	SECURE PROPERTY: secure your loved one's firearms and/or access to a gun safe; secure your loved one's jewelry and other valuables.

☐	**Secure Mail:** secure your loved one's mail; contact the USPS to establish mail forwarding or a mail hold.
☐	**Locate Online Access Information:** locate your loved one's records for accessing their digital assets, including online banking, online debts, online utilities, streaming services, etc.
☐	**Secure Email:** secure your loved one's email accounts by establishing access and possibly changing the password; consider forward email to your account for ease of access.
☐	**Secure Social Media:** secure your loved one's social media account(s); memorialize or deactivate the account(s).
☐	**Cancel Services:** determine which utility services your loved one has that are no longer needed and cancel them, including cell service, cable/dish, Internet, etc.
☐	**Cancel Services:** determine which streaming and subscription services your loved one has that are no longer needed and cancel them, including Netflix, Hulu, Audible, Spotify, Amazon Subscribe & Save, other applications on their cell phone, etc.
☐	**Locate Important Documents:** locate your loved one's asset account statements, credit card statements, life insurance policy(ies), stock/membership certificates, savings bonds, etc.
☐	**Cancel Autopay:** determine whether your loved one utilized autopay for any services or bills and consider shutting off autopay to better manage cashflow.
☐	**Locate Important Documents:** locate your loved one's deed(s), land contract(s), lease(s), note(s), mortgage(s), appraisals, title insurance policies, etc.
☐	**Locate Important Documents:** locate your loved one's estate planning documents and any memorandums regarding the distribution of personal property.
☐	**Locate Important Documents:** locate your loved one's tax returns and/or tax reporting statements.
☐	**Locate Important Documents:** locate your loved one's title(s), registration(s), firearm permit(s) and/or registration(s), etc.

☐	NOTIFICATIONS: contact your loved one's attorney; schedule a consultation to discuss the legal side of administration.
☐	NOTIFICATIONS: contact your loved one's employer; make arrangements to gather personal property if they had an office; make arrangements to collect their final paycheck.
☐	NOTIFICATIONS: contact your loved one's landlord, if they were a renter, and make arrangements to gather their personal property; communicate with the landlord about the lease term and collecting their security deposit.
☐	NOTIFICATIONS: contact your loved one's tenant(s); review lease(s) and determine lease term; locate account holding security deposit.
☐	NOTIFICATIONS: contact your loved one's financial advisor; inquire about any required minimum distributions for retirement accounts; determine ownership/beneficiary of account(s).
☐	NOTIFICATIONS: contact your loved one's CPA/accountant/tax preparer; inquire about status of most recent filings and next steps for final tax return.
☐	NOTIFICATIONS: contact your loved one's insurance agent; inquire about reducing insurance on vehicles; inquire about requirements for homeowner's insurance; determine beneficiary of life insurance policy(ies).
☐	NOTIFICATIONS: contact your loved one's bank(s)/credit union(s) to secure their account(s); determine ownership/beneficiary of account(s).
☐	NOTIFICATIONS: contact your loved one's pension company; inquire about whether any payments must be repaid.
☐	NOTIFICATIONS: contact your loved one's employees; review their business records to determine chain of command/successor; make arrangements to either dissolve/close business or sell business.
☐	NOTIFICATIONS: contact the credit bureaus to protect against identify theft.
☐	NOTIFICATIONS: contact your loved one's credit card company(ies) and close their accounts.

☐	Notifications: contact the Secretary of State and cancel your loved one's driver's license; remove your loved one from the voter registration roll.
☐	Real Property Administration: determine whether your loved one's homeowner's insurance and property taxes were escrowed; make arrangements for payment if they were not.
☐	Real Property Administration: determine ownership succession of real property; notify the local city/township/village assessor of the new owner; file a Property Transfer Affidavit.
☐	Real Property Administration: file a rescission of the Principal Residence Exemption that your loved one was claiming on their home; possibly file a new Principal Residence Exemption claim if you are the new owner.
☐	Asset Administration: compile an inventory of your loved one's assets and determine ownership succession, beneficiary(ies), and/or the necessity for probate administration.
☐	Asset Administration: run a search for unclaimed property in your loved one's name; make sure to check for unclaimed property in any other state they may have lived in.
☐	Asset Administration: notify new owner(s) of the transfer of asset(s) and provide them with any related documentation.
☐	Asset Administration: notify beneficiary(ies) of the transfer of asset(s) and provide them with any related documentation to file a claim.
☐	Asset Administration: distribute your loved one's personal property according to their Will, Trust, or other legal memorandum; hold a yard/garage/estate sale; make donations etc.
☐	Asset Administration: contact a realtor about listing/selling your loved one's real property; determine if an appraisal should be completed prior to listing.
☐	Managing Bills/Expenses: gather all of your loved one's bills, including preexisting debts; determine whether any bills/expenses are not legally enforceable or secured by collateral.
☐	Trust/Probate Administration: administer your loved one's Will or Trust through the appropriate channels; consult with an attorney about the additional requirements/tasks related to this process.