

What to do Upon Death of a Loved One

The loss of a spouse or other loved one is one of the most difficult events in life that any of us have to deal with. Losing a spouse or other loved one creates an emptiness which can be almost paralyzing. Yet it is inevitable that we all have to deal with death of a loved one during our lifetimes.

It goes without saying, that all of us are different and we acquire different amounts and types of assets during our lifetime. Accordingly, the list below is meant to cover some common things to do, or not to do, to get you started. The items are not listed in order of importance, but these are all things you should consider.

1. Do not procrastinate! Contact me immediately as there are often time sensitive matters that need to be reviewed and acted upon or items that need to be gathered for our initial meeting.
2. Notify your clergy and a local funeral home to discuss funeral services.
3. Notify all immediate adult family members of the passing of your loved one. Consider requesting your family to assist by calling a friend or close neighbor.
4. Locate your loved one's important estate planning documents.
5. Do not change title to any assets or close out or roll over any financial accounts without first consulting me.
6. Do not spend or lend large sums of money.
7. Do not make any major business decisions or make large purchases.
8. Do not get into arguments or disagreements with other family members about property, your loved one or the estate matters.
9. Do not procrastinate (Yes, it is worth stating twice)! Contact me immediately. I have found over the years that the more time that lapses due to procrastination, the more there is to do due to matters going unattended for a period of time.