

WHEN A LOVED ONE PASSES AWAY

Dealing with the death of a loved one is overwhelming. We created this guide to, hopefully, help make a very painful situation less difficult.

HELP FOR SURVIVORS & DEPENDENTS

NATIONAL BEREAVEMENT RESOURCE GUIDE
by the Moyer Foundation

LOCAL CRISIS HOTLINES

CHURCHES, YMCA/YWCA, HOSPICE ORGANIZATIONS

DEPARTMENT OF HUMAN RESOURCES
(for elderly and special-needs survivors)

OREGON HUMANE SOCIETY
(for pets)

SOURCES OF IMMEDIATE FUNDS

CHECKING AND SAVINGS ACCOUNTS

UNPAID WAGES

LIFE INSURANCE POLICIES
(personal and/or group)

LIQUID INVESTMENTS
(such as stocks and bonds)

RETIREMENT BENEFITS
(tax implications)

FUNERAL ARRANGEMENTS

DECEDENT'S WISHES AND WRITTEN INSTRUCTIONS

CHOICES AND COSTS

VA BENEFITS FOR VETERANS

MEDICAID ISSUES

OTHER RESOURCES

ACCEPT HELP FROM FRIENDS AND FAMILY

CONTACT ATTORNEY, CPA, AND OTHERS
(see checklist on back)

OREGON STATE BAR'S GUIDE

YOUR ADVISORS AT SUMMA GLOBAL

Note: Please do not use this guide as a substitute for obtaining timely professional advice. If you need help looking for a professional, give us a call.

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call/text: 503.966.9456

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WHEN A LOVED ONE PASSES AWAY CHECKLIST

AS SOON AS POSSIBLE

<input type="checkbox"/> Keep records of ALL expenses	<input type="checkbox"/> Notify family and friends
<input type="checkbox"/> Deal with organ donation (if applicable)	<input type="checkbox"/> Contact guardian, conservator, or person with power of attorney
<input type="checkbox"/> Notify attorney, CPA, and financial advisors	<input type="checkbox"/> Arrange for care of any dependents and/or pets
<input type="checkbox"/> Begin funeral arrangements	<input type="checkbox"/> Secure decedent's residence and personal property
<input type="checkbox"/> Contact local newspaper about placing an obituary	<input type="checkbox"/> Contact decedent's workplace or volunteer organizations (if applicable)

WITHIN TWO WEEKS

<input type="checkbox"/> Order 10-15 death certificates	<input type="checkbox"/> Contact insurance companies
<input type="checkbox"/> Contact post office and utility companies	<input type="checkbox"/> Locate important documents (titles, deeds, life insurance, etc.)
<input type="checkbox"/> Make appointment with attorney to discuss estate	<input type="checkbox"/> Cancel or rearrange home deliveries and other services (visiting nurse, etc.)
<input type="checkbox"/> Locate decedent's estate planning documents (if any)	<input type="checkbox"/> Change or close down email accounts and social media sites
<input type="checkbox"/> Notify credit card companies	<input type="checkbox"/> Notify banks and financial institutions
<input type="checkbox"/> Determine if any bills* must be paid immediately and contact the companies in question	

**DO NOT pay any of decedent's debts until attorney discusses with family or executor.*

WITHIN ONE MONTH

<input type="checkbox"/> Notify Social Security	<input type="checkbox"/> Notify the VA (if applicable)
<input type="checkbox"/> Follow up with insurance companies on payout	<input type="checkbox"/> Gain access to and inventory any safe deposit box(es)
<input type="checkbox"/> Gather together and organize financial documents:	
<input type="checkbox"/> Tax returns	<input type="checkbox"/> Stock certificates registered in decedent's name
<input type="checkbox"/> Life insurance policies (if any)	<input type="checkbox"/> Deeds to real property owned by decedent
<input type="checkbox"/> Vital records (birth, death, marriage, divorce certificates)	
<input type="checkbox"/> Bank, brokerage account, and credit card statements (financial advisors can help)	
<input type="checkbox"/> Retirement accounts (IRA, 401k, etc.) in decedent's name	
<input type="checkbox"/> Any promisory notes under which decedent was entitled to received payment	
<input type="checkbox"/> Titles to any motor vehicles and/or mobile homes listed in decedent's name	
<input type="checkbox"/> Any business or partnership interest(s) owned by decedent	

AFTER FIRST MONTH

<input type="checkbox"/> Deal with motor vehicle title(s)
<input type="checkbox"/> Work with CPA, attorney, and financial advisor(s) to handle estate matters
<input type="checkbox"/> Use Summa Global as a point of contact or liaison

 We are here for you.