

# 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.*

SUMMA  
GLOBAL

wealth redefined

# 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 promissory 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.