

IMMEDIATE STEPS AFTER LOSING A LOVED ONE

➤ SUPPORT FROM OUR TEAM

Signature Wealth Concepts would like to extend our deepest condolences during this difficult time. Whether you are the spouse, partner, child, parent, sibling, or friend of the deceased, there are necessary tasks and decisions that must be made when a loved one passes away.

Having assisted many people in similar situations, we know you will have questions. You are dealing with issues and emotions you may never have faced before. Over the next few months, you will need to make important choices that you may feel unprepared for.

We hope this checklist helps you gather the documents you'll need as well as suggestions on how to find them. We are here to help you through this difficult time.



480-444-3780 (Scottsdale)
520-747-3373 (Tucson)



www.signaturewealthconcepts.com



contactus@signaturewealthconcepts.com

> IMMEDIATE STEPS

During a difficult time, this checklist can help ensure you don't miss any key steps in the process.

✓ ACTION ITEMS

Obtain will and/or trust documents

Obtain original death certificates

Order multiple copies from the funeral home or local vital records office. Original certificates with the cause of death stated on the certificate will be needed.

Secure the deceased's property

Ensure the residence is locked and valuables are protected.

Residence address/Apt#/gate code/garage code: _____

DATE
COMPLETED

> NEXT STEPS

Action items within 2 weeks

✓ ACTION ITEMS

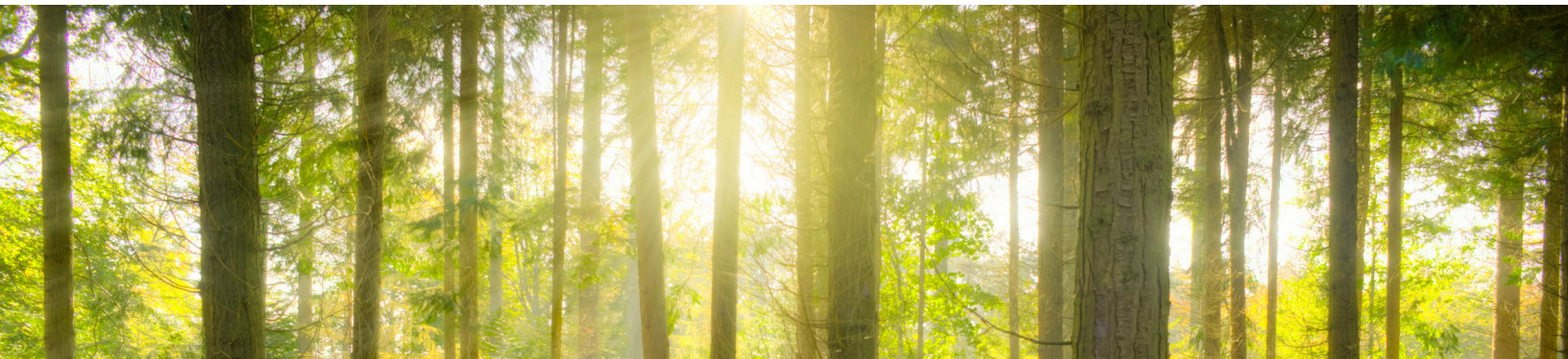
Collect important documents

Financial records (bank and investment accounts, retirement accounts)

Insurance policies

Deeds and titles for property

DATE
COMPLETED





NEXT STEPS

Action items within 30 days



ACTION ITEMS

DATE COMPLETED

Manage financials

- Contact employer (if applicable) for any final paycheck or benefits.
- Meet with financial advisor who can assist with financial decisions and asset transfers.
- Inventory assets and liabilities: list all assets (bank accounts, investments, properties) and liabilities (debts, mortgages, credit card balances).
- Settle debts: pay off any outstanding bills and debts using estate funds, if available
- Inform insurance carriers (auto, home, life, disability, LTC).
- Work with an attorney who can help with probate or settling any disputes.

Social Security

- Discontinue benefits for the deceased.
- Determine survivor benefits.

Handle taxes

- File a final income tax return: typically, due by the tax deadline of the following year.
- Estate tax return (if applicable): consult a tax professional to determine if the estate must file.

Claim benefits:

- Life insurance proceeds.
- Pension survivor benefits.

