



what to do after a loss

and how an after loss professional can help

In the Immediate



- Secure care for pets and dependents
- Secure home and valuables
- Clean out food and other perishables if house is empty
- Notify estate attorney and financial advisor
- Notify loved one's employer
- Notify social security
- Plan funeral services
- Write obituary

Finding Important Docs



- Will, Trust, Other Legal Docs
- Birth and Marriage Certificate
- Social Security Card
- Driver's License
- Car Title and Registration
- House mortgage or deed information
- Insurance Policy Info (Health, Property, Life)
- Financial Account information

Save for an Attorney



- Review and analyze the will
- File for administration of estate or probate the will, if needed

- Discuss open debts for the lost loved one to determine what should be paid
- Ask what your state's stance is on digital assets belonging to the lost loved one

For Your After Loss Professional



- Obtain death certificate
- Notify post office and forward mail
- Notify Veteran's Affairs
- Notify life insurance companies (start claims process for life insurance)
- Notify health insurance
- Notify property insurance
- Notify utilities and update account owner and payment
- Create list of all subscriptions and services that are no longer needed and close out
- Notify mortgage and car loan company
- Investigate potential for benefits from social security, union, pension or retirement death benefits, veteran's burial allowance, medical reimbursements
- Notify banks and transfer funds appropriately
- Notify credit card company companies
- Notify investment organizations
- Cancel cell service
- Locate resources to sell property
- Manage and/or locate resources for clean out and moving of items
- Close out online accounts
- Notify credit reporting institutions and put a freeze on lost loved one's SSN
- Archive and memorialize social media
- Notify DMV and Voter's Registration
- Work with CPA to file final tax return for lost loved one