

Y our step-by-step guide.

Within first 24 hours:

- Determine whether any of decedent's property needs to be safeguarded, such as a motor vehicle, vacant house, etc.
- Ensure that proper funeral arrangements have been made.
- Do not distribute any assets until proper legal advice obtained.

Within 2 weeks:

- Locate the decedent's letter of instruction, if any.
- Locate the original Will and read it.
- Locate important records such as titles, deeds and life insurance policies.
- Make appointment with an attorney to discuss estate.
- Notify life insurance company(ies) of the death and request claim(s) forms.
- If there is mortgage insurance on home, notify insurance company of death.



- Determine if any bills must be paid immediately.
- Contact creditors that expect immediate payment and notify creditor of death.
- Notify credit card companies of death.
- Cancel credit cards on which decedent was the only signer.
- Obtain bill for last illness from hospital.
- Order at least six death certificates from the funeral home.
- Contact Post Office to make any necessary changes in delivery of mail.

Within 1 month:

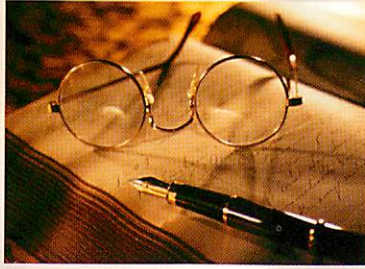
- Notify Social Security Administration of the death, and any other organization paying on retirement or paying an annuity upon death.
- Gather together and organize financial documents:
 - Bank accounts owned by decedent
 - Mutual funds owned by decedent
 - Brokerage accounts owned by decedent
 - Certificates of Deposit in decedent's name
 - Stock certificates registered in decedent's name

- Any promissory notes under which decedent was entitled to receive payment
- Titles to motor vehicles and/or mobile homes that are listed in decedent's name
- Deeds to real property owned by decedent
- Appraisals of jewelry or other valuable personal property owned by decedent
- Gain access to and inventory any safe deposit box.
- Obtain the account balance on mortgages, loans, checking and savings accounts as of the date of death.
- Bring original Will, financial documents, balances, death certificates and inventory of safe deposit box to meeting with attorney.
- Notify CPA, accountant or bookkeeper of the death.

Within 2 to 6 months:

- If automobiles are held in joint tenancy, change motor vehicle titles to reflect ownership by the surviving joint tenant.
- If stocks or bonds are held in joint tenancy, contact stockbroker to change records to reflect ownership only by the surviving joint tenant.





Losing a loved one is something that will happen to all of us at some time in our life. Few of us are prepared for it or the grief it brings. This brochure is a resource you'll want to keep close at hand as you find your way through this difficult period. It was designed as a step-by-step guide to help you deal with some details that might otherwise be overlooked. For more detailed information on probate matters, please visit www.azprobate.com. In addition to providing legal forms that you can download and print, this user-friendly website answers questions about everything from executors, beneficiaries and wills to conservatorship and guardianship.

For more information on probate matters, visit www.azprobate.com

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What do I do next?



Things to do after the death of a loved one