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Client Checklist

We are sorry to hear of your loss. We do look forward to getting together with you to discuss this situation. A word of advice: you are going to hear a lot of different things from a lot of different people. Most of them are well meaning but most of them are wrong! So other than what we have set out below, don't do anything until we get together.

The moral of this story is don't get your legal advice from the CPA, don't get your medical advice from the notary public, and don't get your tax advice from the real estate broker. The right thing to do is to get the proper expert for the appropriate advice.

Here's what you should do right now:

Protect the Residence of the Deceased

Secure access and evaluate need for security at Decedent's residence. Are there valuables that need to be secured?
Cancel or rearrange home deliveries
Contact the Pet Caregiver/Guardian and Pet Financial Caregiver for the care of any companion pets at the residence
Have Post Office hold or forward mail.
Find perishable property (food, plants, etc.), arrange for care or disposal.

Plan the Funeral

Find and review Decedent's expressed funeral and burial wishes.
Plan and arrange for funeral.
Work with funeral director to order death certificates.
Prepare and arrange for obituary.
Arrange for mortuary, cemetery, burial, and cremation, as appropriate.
Keep records of all payments for funeral and other expenses.

Appointment with Us
If you haven't already done so, call us for an appointment so we can guide you in your specific situation.