FINANCIAL CHECKLIST

- Don't make any major financial decisions unless absolutely necessary
- Obtain copies of death certificates
- Make funeral arrangements
- Review living wills and powers of attorney
- Create an emergency budget
- Find immediate cash or assistance
- Pay bills
- Continue health care coverage
- Handle business affairs
- Notify financial institutions
- Apply for death or disability benefits
- Contact social security
- Contact employer
- Seek military or veterans benefits
- Seek medical and disability benefits
- Address tax payments
- Organize financial records
- Develop a long-term budget
- Discuss finances with family
- Transfer ownership
- Postpone planned giving
- Park insurance benefits
- Contact creditors
- Leave retirement accounts and investments alone
- Seek professional advice
- Maintain financial control
- Educate yourself financially
- Update wills and beneficiaries
- Review your life and disability insurance
- Collect financial and estate documents
- Settle the estate
- Make your own life plans
- Save for your own retirement
- Develop an investment plan for your needs

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