

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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