

WHAT TO DO AFTER A LOVED ONE DIES

A Florida Family Checklist

Immediate Steps (First 24–48 Hours)

- ☐ Notify close family members and loved ones.
 - ☐ Determine whether organ donation, anatomical donation, or prepaid funeral arrangements exist.
 - ☐ Locate any written burial or cremation instructions.
 - ☐ Contact the funeral home or cremation provider.
 - ☐ If applicable, notify the decedent's employer.
 - ☐ Arrange care for pets or dependent family members.
 - ☐ Obtain multiple certified death certificates (generally 8–12).
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Secure Property

- ☐ Lock and secure the home.
- ☐ Collect all keys, garage door openers, and alarm codes.
- ☐ Secure firearms, jewelry, cash, and valuables.
- ☐ Remove perishables if the property will remain vacant.
- ☐ Forward or monitor the mail.
- ☐ Continue homeowner's insurance.
- ☐ Do not allow anyone to remove property until ownership is determined.
- ☐ Secure the decedent's cell phone and computer.
- ☐ Do not cancel the cell phone service until important accounts have been accessed.

Locate Important Documents

- ☐ Original Will
 - ☐ Revocable Living Trust
 - ☐ Durable Power of Attorney (no longer effective after death but useful for records)
 - ☐ Health Care Directive
 - ☐ Deeds
 - ☐ Vehicle titles
 - ☐ Business records
 - ☐ Tax returns
 - ☐ Insurance policies
 - ☐ Military discharge papers (if applicable)
 - ☐ Marriage certificate
 - ☐ Divorce judgments
 - ☐ Birth certificates
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Collect Financial Accounts & Income Sources (to the extent applicable)

- ☐ Bank Account Statements
- ☐ Investment Account Statements
- ☐ Retirement Account Statements
- ☐ Pension Information
- ☐ Social Security Card
- ☐ Social Security Benefit Statement (if the decedent was receiving benefits)
- ☐ Life Insurance Policy Information
- ☐ Credit Card Statements
- ☐ Mortgage Statements
- ☐ Vehicle Loan Statements
- ☐ Safe Deposit Box Information

Important: Every estate is unique. This checklist is intended as a general guide and is not legal advice. The appropriate next steps will depend on the decedent's assets, estate planning documents, and family circumstances. Consult with an experienced Florida probate attorney regarding your specific situation.

- ☐ Digital Passwords (if available)
 - ☐ Operating Agreements | Business Succession Plans
 - ☐ Stocks/Bonds/CDs
 - ☐ Annuity Contracts
 - ☐ Health Savings Accounts (HSAs)
 - ☐ Cryptocurrency or Digital Assets
 - ☐ Recent Utility Bills
 - ☐ Business Tax Returns
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Government Benefits & Notifications

- ☐ Confirm the funeral home has reported the death to Social Security.
 - ☐ Determine whether a surviving spouse or dependent may qualify for survivor benefits.
 - ☐ Notify the Department of Veterans Affairs (if applicable).
 - ☐ Contact pension administrators regarding survivor benefits.
 - ☐ Did the decedent own an interest in an LLC, corporation, or partnership?
 - ☐ Were there any assets located outside of Florida?
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Determine Whether Probate May Be Needed

- ☐ Did the decedent own Florida real estate individually?
- ☐ Were there assets titled solely in the decedent's name?
- ☐ Were beneficiary designations in place?
- ☐ Was there a Revocable Living Trust?
- ☐ Was there a Lady Bird Deed?
- ☐ Were there jointly owned assets?

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Do NOT Do These Things Yet

- ☐ Do **not** distribute personal property.
 - ☐ Do **not** close bank accounts.
 - ☐ Do **not** pay debts until advised.
 - ☐ Do **not** transfer vehicles.
 - ☐ Do **not** sell real estate.
 - ☐ Do **not** give away valuables.
 - ☐ Do **not** assume probate is unnecessary.
 - ☐ Do **not** cancel homeowner's, automobile, or liability insurance.
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Information Your Attorney Will Need

- ☐ Death Certificate
- ☐ Original Will
- ☐ Trust Documents
- ☐ Approximate Asset Values
- ☐ Deeds
- ☐ Vehicle Titles
- ☐ Bank Statements
- ☐ Investment Statements
- ☐ Mortgage Information
- ☐ List of Heirs with Contact Information
- ☐ Approximate Balances of Bank and investment accounts
- ☐ Existing Mortgage Payoff Information
- ☐ Prior Gift Documents
- ☐ Contact information for the CPA and Financial Advisor

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Questions to Ask

- ☐ Is probate required?
 - ☐ Does the home qualify as Florida homestead?
 - ☐ Is Summary Administration available?
 - ☐ Are there creditor issues?
 - ☐ Are there tax concerns?
 - ☐ Can probate be avoided?
 - ☐ What deadlines apply to this estate?
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Bring to Your Consultation

- ✓ Death Certificate
 - ✓ Estate Planning Documents
 - ✓ Financial Statements
 - ✓ Property Information
 - ✓ Insurance Policies
 - ✓ List of Family Members & Their Contact Information
 - ✓ Name of Personal Representative (if there is a Will) & Contact Information
 - ✓ Questions You Want Answered
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NEED GUIDANCE? WE ARE HERE TO HELP!

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SCHEDULE A CONSULTATION

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