

IMMEDIATE ACTIONS (First 24–72 Hours)

- ☐ Obtain legal pronouncement of death (hospital, hospice, or emergency services)
 - ☐ Notify immediate family members
 - ☐ Notify close friends or faith/community leaders
 - ☐ Arrange care for children, dependents, or pets
 - ☐ Secure the home, vehicles, and valuables
 - ☐ Locate any prepaid funeral or burial plans
 - ☐ Select funeral home and plan services (burial, cremation, memorial)
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FIRST WEEK TASKS

- ☐ Order certified death certificates (10–15 copies recommended)
- ☐ Locate important documents:
 - ☐ Will / Trust
 - ☐ Marriage certificate
 - ☐ Birth certificates
 - ☐ Social Security cards/numbers
 - ☐ Insurance policies
 - ☐ Property deeds & vehicle titles
 - ☐ Recent tax returns
- ☐ Notify spouse's employer (if applicable)
 - ☐ Final paycheck
 - ☐ Accrued vacation pay
 - ☐ Employer life insurance
 - ☐ Survivor or pension benefits

FINANCIAL & LEGAL TASKS (Weeks 1–6) — California Specific

☐ Contact Social Security Administration

- ☐ Apply for survivor benefits
- ☐ Apply for one-time death benefit (if eligible)

☐ File life insurance claims

☐ Determine if probate is required in California

- ☐ Review estate value (California probate generally required if assets exceed \$184,500 and are not in trust)
- ☐ Identify county of residence for filing

☐ Obtain and file required California probate forms

☐ Schedule meeting with a California estate/probate attorney

☐ Meet with financial advisor or CPA familiar with California law

☐ Create a list of all California-based assets and debts

ACCOUNTS & ASSETS

☐ Notify banks and credit unions

☐ Notify investment and retirement account providers

☐ Retitle joint accounts where required

☐ Transfer or update ownership of:

- ☐ Home or real estate
- ☐ Vehicles
- ☐ Business interests

☐ Inventory safe deposit boxes

DEBTS & BILLS

- ☐ List outstanding debts and recurring bills
- ☐ Notify creditors of death
- ☐ Review debts with attorney before paying
- ☐ Cancel or adjust automatic payments

INSURANCE & GOVERNMENT BENEFITS

- ☐ Notify health insurance provider
- ☐ Review auto insurance coverage
- ☐ Review homeowners or renters insurance
- ☐ Cancel unnecessary insurance policies
- ☐ Contact Veterans Affairs (if applicable)
 - ☐ Burial benefits
 - ☐ Survivor benefits
 - ☐ Military honors

DIGITAL & PERSONAL MATTERS

- ☐ Access and manage email accounts
- ☐ Memorialize or close social media accounts
- ☐ Cancel subscriptions and memberships
- ☐ Secure or download digital photos and files
- ☐ Redirect or monitor mail

TAXES — California Specific

- ☐ File final federal income tax return (IRS)
- ☐ File final California state income tax return (FTB)
- ☐ Determine if an estate or trust tax return is required
- ☐ Review California community property rules with CPA or attorney
- ☐ Determine eligibility for California property tax reassessment exclusions

LONGER-TERM TASKS (Months Later) — California Specific

- ☐ Update your California will or trust
- ☐ Update beneficiaries on all accounts
- ☐ Update powers of attorney (California statutory forms)
- ☐ Update Advance Health Care Directive (California-specific)
- ☐ Review long-term financial plan considering California taxes and cost of living

SELF-CARE & SUPPORT

- ☐ Accept help from family and friends
- ☐ Consider grief counseling or support groups
- ☐ Avoid major financial or life decisions early on
- ☐ Allow yourself time and space to grieve