

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)

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