Survivor's Checklist

This information should be kept with important papers and describes events to occur after a loved one's passing.

IMMEDIATE:

- Obtain certified death certificate (12 copies at least). Is an autopsy necessary?
- First 24 hours: Organ donation? Check for signed authorizations and arrange immediately.
- Inventory safe deposit boxes and personal papers of the deceased. Look for any organ donation authorizations, burial insurance policies, prepaid mortuary, or cremation society plan. These should be included in the Family Estate Organizer.
- Contact mortuary to make funeral and burial or cremation arrangements. Arrange Obituary notice.
- Arrange for obituary notice.
- Contact deceased's employer/business partners.
- Contact friends, relatives, religious organizations, doctor, and your advisor (see 'People To Contact Upon Death" under Misc. Tab). Allow them to help you out in this time of need.
- Make arrangements for dependent and pets, if any.
- Cancel regular elder assistance services, if any. (Meals on Wheels, mail prescriptions, etc.)
- Secure deceased's home and remove valuables.

WITHIN THE NEXT 30 DAYS:

- If applicable, notify or have advisor help you notify:
  - Social Security Administration to stop checks
  - Department of Health Services if the deceased was receiving Medicaid
  - Veterans Administration
  - Payers of any pensions or annuities
  - DMV
  - All three credit agencies (see back page for contact info)
  - Forward mail to appropriate person
- Locate documents such as will, Trust(s), insurance policies, and deeds to real estate utilizing the Family Estate Organizer
- If there was a Living Trust, Contact:
  - Successor Trustee (Trust manager) for eventual distribution of assets
  - **Richard Loek, Onesta Wealth Management, 408-459-8383** for review of possible death and/or income taxes owing and assistance in sorting out and distributing assets
  - Insurance agent / companies to arrange for any death benefits to be paid to beneficiaries
  - Financial advisors / IRA and pension companies for any death benefits to be paid to beneficiaries
- If there was No Trust and only a will, Contact attorney on file in Family Estate Organizer:
  - County Clerk and deposit the original will within 30 days
  - Executor to begin the probate process with an attorney
  - Advisor's Company, Name, Phone. for review of possible death and/or income taxes owing and assistance in sorting out and distributing assets

Onesta Wealth Management, LLC – 1875 Winchester Blvd #101, Campbell, CA 95008 408-459-8383

Survivor's Checklist

WITHIN THE NEXT 60 DAYS:

- Notify any creditors and utility companies
- Transfer title on jointly held assets
- Inventory personal effects and arrange for disposition to family members, relatives, or charities

WITHIN SIX MONTHS:

- Richard Loek at Onesta Wealth Management (408) 459-8383 for review of finances and revised financial plan
- If surviving spouse, to:
    - Replace a lost pension or Social Security.
    - Update your Will or Trust

IMPORTANT CONTACT INFORMATION

Richard Loek
Onesta Wealth Management, LLC
1875 Winchester Blvd, #101
Campbell, CA 95008
408-459-8383

DEPARTMENT OF VETERAN'S AFFAIRS
1-800-827-1000
www.vba.va.gov/VBA

SOCIAL SECURITY ADMINISTRATION
1-800-772-1213
www.ssa.gov/pgm/links_survivor.htm

CREDIT REPORTING AGENCIES

EQUIFAX
1-800-685-1111 • www.Equifax.com

TRANS UNION
1-800-888-4213 • www.TransUnion.com

EXPERIAN
1-888-397-3742 • www.Experain.com

ADDITIONAL SUPPORT

Hospice Foundation of America 1-800-854-3402
GriefNet www.GriefNet.org
Grief Share www.GriefShare.org