

## **WHAT TO DO WHEN A FAMILY MEMBER DIES**

1. Contact Brown & Vogel, LLC immediately 866-288-5088.
2. Tend to immediate family needs.
3. Look and see if FUNERAL ARRANGEMENTS have been completed. These can be found in the red estate planning portfolio behind the “Memorial Instructions” tab. Follow the instructions if completed.
4. **DO NOT MOVE OR CLOSE ACCOUNTS.**
5. **DO NOT ROLL OVER** any retirement accounts.
6. **DO NOT ACCESS** any safe deposit boxes.
7. **DO NOT USE ON-LINE ACCOUNTS** (unless specifically authorized to do so).
8. **Locate any passwords and user names.**
9. The Funeral Director will ask how many death certificates to order, 10 will be sufficient.
10. Secure the personal residence
  - Change locks;
  - Remove and inventory valuables; and,
  - Remove perishables.
11. Restrict access to automobiles.
12. Contact the Social Security Administration (funeral home may do this for you).
13. Contact the Department of Veterans Administration (if applicable).
14. Have the mail forwarded.
15. Transfer Utilities.
16. Gather property and casualty insurance information.
17. Cancel magazines and inquire about refunds.
18. Cancel credit cards and inquire about refunds.
19. Secure the location of the original will.
20. Review Information on Identity Theft on the *Reverse Side of this.*