Task List for Things to do after a loved one's death:

A. Breathe. Take a moment for yourself.

Immediate Tasks (First 24–48 Hours)

- **Get pronouncement:** Obtain an official medical pronouncement of death from a doctor, hospice nurse, or coroner.
- **Care for dependents:** Arrange immediate care for any children, elderly family members, or pets left behind.
- **Secure property:** Lock up the deceased person's home, car, online accounts and business. Throw out perishable food and water plants.
- **Contact funeral home:** Choose a funeral director to arrange burial, cremation, or green funeral wishes. (use the document from the estate plan)
- **It is not the family's responsibility to pay debts.** Do not pay from your own funds. If there is a mortgage on a house you want to retain, you may want to make arrangements to pay the mortgage and be reimbursed from the estate. Probate will determine who gets the house (not who makes a payment).
- Contact the deceased person's employer.

Short-Term Tasks (First 1–2 Weeks)

- **Order death certificates:** Ask the funeral director for multiple certified copies; you will need them for banks, insurance, and legal tasks.
- **Locate documents:** Find the original will, trust, birth certificate, and marriage license.
- **Forward mail:** Submit a mail-forwarding order at the post office so bills and important notices do not pile up.
- **Notify agencies:** Contact the Social Security Administration, Medicare, etc.

Executor and Estate Tasks (First Month)

- **File the will:** Take the original will to an attorney or local county probate court to officially be named executor. **A will by itself has no legal effect**, it must be probated some way to have an effect and transfer assets. This does not mean an administration must occur, there are numerous ways in Texas to avoid an administration and its expense if its not necessary.
- **Inventory assets:** Make a complete list of bank accounts, investments, real estate, vehicles, and valuable personal property.
- **Handle bills and credit:** Make a list of ongoing bills (mortgage, utilities) and notify credit card companies or major credit bureaus to prevent identity theft. These are not the personal responsibility of the heirs. They should be handled in probate if at all.
- **Hire professionals:** Consult a certified public accountant (CPA) for final tax returns and a probate attorney for estate settlement.