The End of Life Planner

UNITED STATES

FREE · GENERAL INFORMATION

Large print edition

> This document is general information and a form. It is not a substitute for the advice of an attorney.

When a parent dies

The first day, the first week and the first month: who is doing what, what to leave alone for now, and who you have told.

Prepared for the United States

This checklist is for the family of

_____

Kept by

_____

Started _____ MM / DD / YYYY

Last updated _____ MM / DD / YYYY

Our parent's state

Its own pages are listed at theendoflifeplanner.com/us/what-to-do-when-a-parent-dies

Prepared and checked by Valoren, a publisher in London, England. No attorney has reviewed it. Facts in it show the date they were read. Checked November 3, 2026.

theendoflifeplanner.com/us/what-to-do-when-a-parent-dies

One page to read before you start

What this is

A checklist for the son or daughter who is doing the practical things after a mother or father dies. One sheet for who is doing what. Tick lists for the first day, the first week and the first month. A page of things to leave alone for now. A page for who you have told, and one for the papers you have found.

What it is not

It does not say what your family must do, or who inherits, or who may act for your parent. Those are your parent's state's law and the court's. The page it came from quotes the official bodies on each of them; an attorney in your parent's state can say how they apply to you.

How to use it

Fill in who is doing what first, together, and give each person their page. Tick each row when it is done and write the date. If a row is not for your family, write "not us" on the line and move on. Keep the file with the certified copies, in one place that everyone knows.

The things to leave alone

The hardest page is the one about leaving things alone. A power of attorney ends at the death, a payment for the month of death goes back, and the things in the house wait for the person the court appoints. Each row on that page has the official sentence behind it, with the date we read it.

If your other parent is living

Write their name on the who-is-doing-what page beside "Sits with our other parent". The calls about Social

Security, the joint account and the home are theirs to make; the page explains each one in the official words.

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Who is doing what

One person for each job. Write their name and phone number, tick when it is done, and tell each other what was said.

The calls

The funeral home, Social Security, the bank, the insurers, the employer or pension, the landlord or servicer.

Who **Phone**

_____ _____

Done on MM / DD / YYYY

Done ☐ _____

The certificates

Ordering the certified copies and keeping them in one place.

Who **Phone**

_____ _____

Done on MM / DD / YYYY

Done ☐ _____

The house

The keys, the mail, the pets, the fridge, the heating, the locks.

Who **Phone**

_____ _____

Done on MM / DD / YYYY

Done ☐ _____

The papers

The will, the deeds, the policies, the statements, the passwords.

Who **Phone**

_____ _____

Done on MM / DD / YYYY

Done ☐ _____

The funeral

The prices, the notice, the service, the bill.

Who **Phone**

_____ _____

Done on MM / DD / YYYY

Done ☐ _____

The money

What the estate pays, and a note of what each of you has paid out.

Who **Phone**

_____ _____

Done on MM / DD / YYYY

Done ☐ _____

Sits with our other parent

For each call and each form.

Who **Phone**

_____ _____

Done on MM / DD / YYYY

Done ☐ _____

The belongings

Nothing shared out yet; the list of what people have asked for is page 36.

Who **Phone**

_____ _____

Done on MM / DD / YYYY

Done ☐ _____

The job

_____

Who **Phone**

_____ _____

Done on MM / DD / YYYY

Done ☐ _____

The job

Who **Phone**

Done on MM / DD / YYYY

Done ☐

The job

Who **Phone**

Done on MM / DD / YYYY

Done ☐

The job

Who	Phone

Done on MM / DD / YYYY

Done ☐ _____

A disagreement is not for this sheet, or for a weekend. Write it down and bring it to an attorney in your parent's state together.

The first day

Almost nothing has to happen today except these. Tick each one when it is done.

Someone in authority has pronounced the death
A doctor, a hospice nurse, or the medical examiner. If they died at home and not in hospice, the doctor, the medical

examiner, the health department or a funeral home says how to proceed.

☐ Done

Done on _____ MM / DD / YYYY

The funeral home, or the family, has arranged to move them

There is no rush to move them from home.

☐ Done

Done on _____ MM / DD / YYYY

The funeral director has the Social Security number

They usually report the death to Social Security.

☐ Done

Done on _____ MM / DD / YYYY

We asked the funeral home for its price list before signing anything

It must give you one, and must give prices on the phone.

☐ Done

Done on _____ MM / DD / YYYY

The closest family have been told

In the order our parent would have wanted.

☐ Done

Done on _____ MM / DD / YYYY

Our other parent has someone with them

Today, and for the first calls.

☐ Done

Done on _____ MM / DD / YYYY

The house is locked, and the keys are with

_____

☐ Done

Done on _____ MM / DD / YYYY

The pets are fed and somewhere safe

☐ Done

Done on _____ MM / DD / YYYY

One person is making the calls

Page 4.

☐ Done

Done on _____ MM / DD / YYYY

Nothing has been thrown away, sold or shared out

☐ Done

Done on _____ MM / DD / YYYY

The first week

The telling begins. Close nothing yet; tell each organization of the death and ask what it needs.

Certified copies of the death certificate ordered

Ask each organization whether it needs a certified copy or a photocopy before you order.

☐ Done

Done on _____ MM / DD / YYYY

Social Security has heard

From the funeral home, or from our call.

☐ Done

Done on _____ MM / DD / YYYY

The will found, and who is named in it

The original, not a copy.

Where it was

_____

☐ Done

Done on _____ MM / DD / YYYY

The bank told; nothing closed

☐ Done

Done on _____ MM / DD / YYYY

The employer or pension told

☐ Done

Done on _____ MM / DD / YYYY

The insurers told

Life, home, car, health.

☐ Done

Done on _____ MM / DD / YYYY

The landlord or the mortgage servicer told

☐ Done

Done on _____ MM / DD / YYYY

One credit bureau asked for a deceased alert

It tells the other two.

☐ Done

Done on _____ MM / DD / YYYY

The mail: stopped, forwarded, or managed at the shared address

☐ Done

Done on _____ MM / DD / YYYY

The obituary written without the birth date or the address

☐ Done

Done on _____ MM / DD / YYYY

Any power of attorney retired

The bank told that the agent's authority has ended.

☐ Done

Done on _____ MM / DD / YYYY

The Social Security payment for the month of death

The bank told to send it back.

☐ Done

Done on _____ MM / DD / YYYY

Receipts kept for everything paid out, and by whom

☐ Done

Done on _____ MM / DD / YYYY

Our parent's state page read

The address is on the cover.

☐ Done

Done on _____ MM / DD / YYYY

The first month

Most of this falls to the person the court appoints. The rest is knowing where things stand.

The court: who is appointed, and the letters the bank asks to see

☐ Done

Done on _____ MM / DD / YYYY

Accounts with a named beneficiary, and life insurance claims

☐ Done

Done on _____ MM / DD / YYYY

The mortgage servicer sent proof of the right to the home

☐ Done

Done on _____ MM / DD / YYYY

Property taxes and home insurance kept paid from the estate

☐ Done

Done on _____ MM / DD / YYYY

Utilities and subscriptions: kept, transferred or stopped by the person in charge

☐ Done

Done on _____ MM / DD / YYYY

Debt collectors told who the executor is, and nothing more

☐ Done

Done on _____ MM / DD / YYYY

The programs and businesses our parent used, told

☐ Done

Done on _____ MM / DD / YYYY

If they served: VA burial and survivor benefits asked about

☐ Done

Done on _____ MM / DD / YYYY

Our other parent's Social Security: the one-time payment and survivor benefits asked about

☐ Done

Done on _____ MM / DD / YYYY

The joint account: the bank asked which kind it is

☐ Done

Done on _____ MM / DD / YYYY

Unclaimed money searched: the state's office, old pensions, old policies

☐ Done

Done on _____ MM / DD / YYYY

The final income tax return: who files it, and by when

☐ Done

Done on _____ MM / DD / YYYY

The estate tax return: whether one is required

☐ Done

Done on _____ MM / DD / YYYY

Our parent's state's clocks looked up: the will to the court, the inventory, creditors' claims

☐ Done

Done on _____ MM / DD / YYYY

Leave alone for now

Each row is one thing to leave alone, and the official sentence that says why is on the page this file came from. Tick when the family has agreed.

Paying their bills from our own money

☐ Family agreed

On _____ MM / DD / YYYY

Using their power of attorney

☐ Family agreed

On _____ MM / DD / YYYY

Keeping the Social Security payment for the month of death

☐ Family agreed

On _____ MM / DD / YYYY

Closing their accounts before the court has named someone

☐ Family agreed

On _____ MM / DD / YYYY

Putting their birth date and other details in the obituary

☐ Family agreed

On _____ MM / DD / YYYY

Giving details to a caller who says they are collecting a debt

☐ Family agreed

On _____ MM / DD / YYYY

Paying for a certified copy for every single task

☐ Family agreed

On _____ MM / DD / YYYY

Letting the home's insurance or property taxes lapse

☐ Family agreed

On _____ MM / DD / YYYY

Who we told

One line per organization. Write what they asked for, and any reference number they gave.

The funeral home

Told on MM / DD / YYYY **By**

What they asked for, and the reference

Social Security

Told on MM / DD / YYYY **By**

What they asked for, and the reference

The bank

Told on MM / DD / YYYY **By**

What they asked for, and the reference

The credit bureau

Told on MM / DD / YYYY **By**

What they asked for, and the reference

The employer or pension

Told on MM / DD / YYYY **By**

What they asked for, and the reference

The life insurer

Told on MM / DD / YYYY **By**

What they asked for, and the reference

The landlord or servicer

Told on MM / DD / YYYY **By**

What they asked for, and the reference

The post office

Told on MM / DD / YYYY **By**

What they asked for, and the reference

Organization

Told on MM / DD / YYYY **By**

What they asked for, and the reference

Organization

Told on MM / DD / YYYY **By**

What they asked for, and the reference

Organization

Told on MM / DD / YYYY **By**

What they asked for, and the reference

Organization

Told on MM / DD / YYYY **By**

What they asked for, and the reference

Organization

Told on MM / DD / YYYY **By**

What they asked for, and the reference

Organization

Told on MM / DD / YYYY **By**

What they asked for, and the reference

Organization

Told on MM / DD / YYYY **By**

What they asked for, and the reference

Organization

Told on MM / DD / YYYY **By**

What they asked for, and the reference

Organization

Told on MM / DD / YYYY **By**

What they asked for, and the reference

Organization

Told on MM / DD / YYYY **By**

What they asked for, and the reference

Papers found

Where each one was, and who holds it now. Originals, not copies.

The will, and any later change to it

Found ☐

Where it was

Who holds it now

Deeds and titles: the home, the car

Found ☐

Where it was

Who holds it now

Insurance policies: life, home, car, health

Found ☐

Where it was

Who holds it now

Bank and credit union statements

Found ☐

Where it was

Who holds it now

Retirement and investment account statements

Found ☐

Where it was

Who holds it now

The last tax return

Found ☐

Where it was

Who holds it now

The Social Security card, or the number

Found ☐

Where it was

Who holds it now

Birth and marriage certificates

Found ☐

Where it was

Who holds it now

Military discharge papers, if they served

Found ☐

Where it was

Who holds it now

Phone, computer and passwords

Found ☐

Where it was

Who holds it now

Papers found

Found ☐

Where it was

Who holds it now

Papers found

Found ☐

Where it was

Who holds it now

The belongings

Nothing leaves the house yet. A list of what people have asked for, so nobody has to remember it later.

The item

Who asked for it **Note**

The item

Who asked for it **Note**

The item

Who asked for it **Note**

The item

Who asked for it **Note**

The item

Who asked for it **Note**

The item

Who asked for it **Note**

The item

Who asked for it **Note**

The item

Who asked for it **Note**

The item

Who asked for it **Note**

The item		
Who asked for it	**Note**	

What each person is owed is for the will, the state's law and the person the court appoints.

Where every sentence on the page came from

The official pages behind the checklist, each with the date we read it, printed from the same data as the page. If a date here is older than the page's, the page is newer.

National Institute on Aging: What To Do After Someone Dies
www.nia.nih.gov/health/grief-and-mourning/what-do-after-someone-dies · read October 30, 2026

Social Security Administration: What should I do

when someone dies? (KA-02077)
www.ssa.gov/faqs/en/questions/KA-02077.html · read October 30, 2026 and November 3, 2026

Consumer Financial Protection Bureau: Managing Someone Else's Money: Help for agents under a power of attorney
files.consumerfinance.gov/f/documents/cfpb_msem_national_agents_guide.pdf · read November 3, 2026

Internal Revenue Service: Publication 559 (2025), Survivors, Executors, and Administrators
www.irs.gov/publications/p559 · read October 30, 2026

Federal Trade Commission: Debts and Deceased Relatives
consumer.ftc.gov/articles/debts-and-deceased-relatives · read October 30, 2026 and November 3, 2026

Internal Revenue Service: Deceased taxpayers –

Getting information from the IRS
www.irs.gov/businesses/small-businesses-self-employed/deceased-taxpayers-getting-information-from-the-irs · read October 30, 2026

USAGov: How to get a certified copy of a death certificate
www.usa.gov/death-certificate · read October 30, 2026

Consumer Financial Protection Bureau: Can a debt collector contact me about a deceased relative's debts?
www.consumerfinance.gov/ask-cfpb/can-a-debt-collector-contact-me-about-a-deceased-relatives-debts-en-1469/ · read October 30, 2026 and November 3, 2026

U.S. Postal Service: Mail Addressed to the Deceased
www.usps.com/manage/mail-for-deceased.htm · read October 30, 2026 and November 3, 2026

Social Security Administration: What to do when

someone dies
www.ssa.gov/personal-record/when-someone-dies · read October 30, 2026

Federal Trade Commission: Choosing a Funeral Provider
consumer.ftc.gov/articles/choosing-funeral-provider · read October 30, 2026

Social Security Administration: Survivor benefits
www.ssa.gov/benefits/survivors/ · read October 30, 2026

Consumer Financial Protection Bureau: Am I responsible for my spouse's debts after they die?
www.consumerfinance.gov/ask-cfpb/am-i-responsible-for-my-spouses-debts-after-they-die-en-1467/ · read October 30, 2026

Consumer Financial Protection Bureau: What happens

if I have a joint bank account with someone who died?
www.consumerfinance.gov/ask-cfpb/what-happens-if-i-have-a-joint-bank-account-with-someone-who-died-en-1101/ · read October 30, 2026

Consumer Financial Protection Bureau: What happens to my reverse mortgage when I die?
www.consumerfinance.gov/ask-cfpb/what-happens-my-reverse-mortgage-when-i-die-en-2096/ · read October 30, 2026

Consumer Financial Protection Bureau: How do I get mortgage information about a home I inherited?
www.consumerfinance.gov/ask-cfpb/how-do-i-get-mortgage-information-about-a-home-i-inherited-en-217/ · read October 30, 2026

Consumer Financial Protection Bureau: § 1024.38 General servicing policies, procedures, and requirements.
www.consumerfinance.gov/rules-policy/regulations/1024/38/ · read October 30, 2026

U.S. Department of Housing and Urban Development: Inheriting a Home Secured by an FHA-insured Home Equity Conversion Mortgage
www.hud.gov/sites/dfiles/SFH/documents/inheriting_hecm_09-23-19.pdf · read October 30, 2026

Consumer Financial Protection Bureau: Does a person's debt go away when they die?
www.consumerfinance.gov/ask-cfpb/does-a-persons-debt-go-away-when-they-die-en-1463/ · read October 30, 2026

Social Security Administration: How Social Security Can Help You When a Family Member Dies (Publication 05-10008)
www.ssa.gov/pubs/EN-05-10008.pdf · read November 3, 2026

Internal Revenue Service: Identity theft guide for individuals
www.irs.gov/identity-theft-central/identity-theft-guide-for-individuals · read October 30, 2026

Consumer Financial Protection Bureau: Is it a scam if

a debt collector calls me after seeing my relative's obituary?
www.consumerfinance.gov/ask-cfpb/is-it-a-scam-if-a-debt-collector-calls-me-after-seeing-my-relatives-obituary-en-1483/ · read October 30, 2026

USAGov: Agencies to notify when someone dies
www.usa.gov/report-a-death · read October 30, 2026

Federal Trade Commission: The FTC Funeral Rule
consumer.ftc.gov/articles/ftc-funeral-rule · read October 30, 2026

California Legislature: Probate Code §13100
leginfo.legislature.ca.gov/faces/codes_displaySection.xhtml?lawCode=PROB&sectionNum=13100 · read October 30, 2026