

Example of Estate To Do List:

Actions to Take Upon My Death

- Direct that my body be taken to _____Funeral Home>
- Inform pastor.
- Make funeral arrangements with pastor and funeral home.
- Get at least 3 original copies of death certificate from medical providing attending my death.
- The funeral home should inform the Social Security Administration of my death.
- Retrieve and review my estate documents from safety deposit box at bank.
- Executor needs to probate my will with the _____County Clerk of Court.
- Notify NC Retirement System of my death.
- Notify _____ County Human Resources of my death as they provide my Medicare Supplement and prescription policy.
- Publish an abbreviated obituary in the newspaper and a longer one at the funeral home website.
- Inform auto/home owners/umbrella insurance providers and put policies in her name.
- Change car registrations and titles to her name.
- Review her estate documents and update beneficiaries and other changes if necessary.
- Inform all financial institutions (credit card, banking, CDs, and investments) of my death.
- Note: I have credit freeze for all 3 major credit reporting agencies. See instructions for unfreezing these if necessary.
- File estate taxes within required time frame.
- Do any necessary Required Minimum Distributions (RMDs) from IRA.