# First-Week Checklist (1 of 2)

For: _____

Date: _____

Nothing here is urgent in the first hours. Take your time, ask for help, and keep a log of every call. Check the Family File for your parent's wishes first.

## The first hours

- [ ] Contact the person your parent named for funeral arrangements, if there is one, and check the file for pre-arranged funeral plans.
- [ ] Contact a funeral home. They will arrange transport and can explain what is needed. You are not obliged to use the first one you call. Ask about prices.
- [ ] Tell family and close friends, following the contact tree. Ask one person to make the calls so you don't have to repeat the news.

## The first days

- [ ] Find the documents. Check the Document Locator for the will, any funeral instructions, and any directions about organ or tissue donation (which may need to be addressed at once).
- [ ] Meet the funeral director. They will ask for information such as full name, date and place of birth, parents' names, and social insurance number (in the US, Social Security number).
- [ ] Decide on arrangements, as set out by your parent's wishes or the family's. Costs vary a great deal, so ask for a written price list, and consider bringing a friend who can ask the questions you may not think of.
- [ ] Secure the home. Lock up, collect valuables, forward mail and care for pets.

## Beware of scams after a death

- [ ] Callers claiming the deceased owed money and demanding payment from the family.
- [ ] Offers of "unclaimed inheritance" or "life insurance payouts" that require a fee.
- [ ] Invoices for services nobody ordered.
- [ ] People offering to help with the estate who ask for upfront payment or account details.

# First-Week Checklist (2 of 2)

For: _____

Date: _____

## The first weeks

- [ ] Estate. If your parent left a will, the executor (estate trustee in Ontario) will need to locate it, and may need a court document to deal with certain assets.
- [ ] Notifying organizations. Make a list over the first weeks. Typically this includes:
- [ ] Government pensions and benefits (in Canada, Service Canada, which also handles survivor and death benefits; the funeral director may help with this)
- [ ] The Canada Revenue Agency or IRS, for the final tax return
- [ ] Banks and financial institutions
- [ ] Insurance companies, including life insurance claims
- [ ] The workplace pension and employer, if relevant
- [ ] Provincial health ministry and driver's licence office
- [ ] Utilities, phone, internet and subscriptions
- [ ] Landlord or mortgage lender
- [ ] Credit bureaus
- [ ] Social media and email providers
- [ ] Final tax return. Deadlines depend on the date of death.
- [ ] Keep records. Keep a log of every call: date, who you spoke to, what was decided. Keep every receipt.

## Call log

| Date and time | Who I spoke to | What was said or decided |
|---|---|---|
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