

Deceased Loved Ones Bills/Debts Checklist

Immediate Steps:

- ☐ Obtain death certificate copies
- ☐ Locate will/estate documents
- ☐ Apply for letters of testamentary
- ☐ Review bank statements and bills
- ☐ Cancel subscriptions/automatic payments

Documentation & Communication:

- ☐ Create inventory of outstanding bills
- ☐ Notify all creditors of the death
- ☐ Send death certificates to relevant companies
- ☐ Keep records of all communications
- ☐ Organize estate-related paperwork

Financial Management:

- ☐ Identify estate assets and accounts
- ☐ List all debts and ongoing payments
- ☐ Determine which bills must be paid
- ☐ Set up payment plans if needed
- ☐ Track all estate-related expenses

Support System:

- ☐ Consult estate attorney if needed
- ☐ Work with financial advisor
- ☐ Connect with grief support resources
- ☐ Delegate tasks to family members
- ☐ Keep beneficiaries informed