

## The Business Side of Dying Checklist

By  
Deidre Edwards

Until you have the death certificate, you will not be able to finalize an account. It's best to get it first, which takes about a week.

This is a basic framework from which you may add your own items.

- ❖ First stop is your county Clerk of Court
- ❖ Annuities
- ❖ Banks, Credit Unions, Financial Institutions
  - Checking Accounts \_\_\_\_\_
  - Savings Accounts \_\_\_\_\_
  - Loans \_\_\_\_\_
  - CDs \_\_\_\_\_
- ❖ Cable, satellite, internet companies
- ❖ Cell phone and telephone companies
- ❖ County Tax Office
- ❖ Credit cards
  - 1. \_\_\_\_\_
  - 2. \_\_\_\_\_
  - 3. \_\_\_\_\_
  - 4. \_\_\_\_\_
- ❖ Educational Institutions
- ❖ Electric company
- ❖ Funeral Home/Internment/Stonemason
- ❖ Gas company
- ❖ House and property insurance companies  
\_\_\_\_\_
- ❖ IRAs and Roth accounts \_\_\_\_\_
- ❖ Life insurance \_\_\_\_\_
- ❖ Mortgage \_\_\_\_\_
- ❖ Medical/Physician \_\_\_\_\_
- ❖ Private Loan companies \_\_\_\_\_
  - School loans
- ❖ Social Security
- ❖ Stocks and investments \_\_\_\_\_
- ❖ Telephone company
- ❖ Veteran's Administration
- ❖ Water company
- ❖ Work-related loans/accounts \_\_\_\_\_

Toolkit for Caregivers

Love Lives Here - Toolkit for Caregiver's Survival