

DEATH NOTIFICATION CHECKLIST

After a family member or friend has passed away in Washington State, there are several important things to do.

Regardless of whether the death was expected or not, this can be a very overwhelming and emotional situation. It is advisable to read through this information *before* a death occurs so you understand the practical steps in this difficult process.

It is a good idea to keep all of *your* important papers in one location *and* tell someone where those items are located.

The terms “deceased” and “decedent” refer to the person who has passed away and “estate” refers to the property belonging to the decedent.

Here is a checklist of steps that may need to be taken care of following the sudden death of a family member or friend:

1. IMMEDIATE STEPS:

- If the death is **sudden** or **unexpected**, call 911 right away.
- If the death occurs in a **hospital** or other place such as a nursing home, talk to the staff about their process.
- Contact the decedent’s close family members and/or friends, employer, his or her doctor (or hospice), and his or her attorney (if any).
- If the decedent was caring for any **dependents** or **animals**, make arrangements immediately for their care.
- Put decedent’s valuables (cash, jewelry, collectible items) in a safe place and be sure the house is locked if no one is home.

2. NEXT STEPS:

- Obtain Death Certificates. You can order certified copies of the death certificate from the funeral director (or the hospice). You may also get them from the local Department of Health office in the county where the death occurred, or from the Washington State Department of Health. Generally, you’ll need one certified copy for each major asset.
- Locate decedent’s important information, such as driver’s license, passport, citizenship, immigration and/or alien registration papers, Social Security card (or number), names and contact information of decedent’s closest family and friends, attorneys, accountant, financial advisor, doctors, etc., birth certificates (of all family members, if available), marriage license or certificate, military service & discharge records (DD214, etc.), user names and passwords to access electronic devices (including computers, cell phones, and other devices) and online accounts (including email accounts, financial records, social media accounts, etc.).
- Gather decedent’s estate planning documents, such as Will and/or Trusts, Community Property Agreements, Final Instructions, Authorization of Disposition of Remains, and/or Designated Agent form, Pre-paid funeral contracts.

- Determine whether decedent had any **insurance policies**, such as life insurance (including premium payment records), health insurance (including Medicare or Medicaid, “Medigap” insurance, private health insurance, dental, and long term care insurance), Property insurance (homeowners/renters insurance, car insurance, etc.), workers’ compensation insurance (and payment records).
- Gather paperwork and all information relating to decedent’s **assets**, such as financial accounts, houses, land, safety deposit box, stock certificates and/or bonds, business interests, survivor annuity benefit papers, employer/retirement benefit (pension) plans, pension/profit-sharing plans, credit cards, tax returns, etc.
- Gather information relating to decedent’s **liabilities & debts**. Make a list of regular bills to have as a reminder. Be sure to note if any are on automatic payment plans and note when payments are due. Give all unpaid bills to the Personal Representative (if any) to be paid. Some examples of bills to locate are utility bills (electric, heating, telephone and/or cable TV, internet, cell phones, water/sewer/garbage, etc.), long term debts (home mortgages, bank line of credit, car loans, etc.), rental payments (home, apartment, assisted living, or nursing home, etc.), credit card bills, insurance bills (health, long-term care, homeowner's, car, life insurance, etc.), medical bills, property tax bills.
- Power of Attorney: If you were the holder of a Power of Attorney (sometimes called an “attorney-in-fact” or the “agent”) for the deceased, your authority to act under the Power of Attorney ends at the time of death.
- Stop all deliveries of unneeded newspapers, home care services (such as meal delivery or nursing services), and cancel any appointments for doctors, dentists, etc.
- Cancel services that are no longer needed (such as cell phones, internet, or cable TV). Do not cancel utilities, as they may still be needed.
- Check and apply for any death benefits or survivor benefits. Call these offices to find out their requirements, such as sending a certified copy of the death certificate.

Useful phone numbers:

- Social Security Administration (800-772-1213). Many funeral homes will report the death to Social Security. The Social Security office automatically notifies Medicare of the death. If the deceased was receiving Social Security payments, the payment for the month of the death must be returned to Social Security. Contact the deceased’s bank to return the full month’s payment as soon as possible. Social Security will then send a new payment adjusted to reflect the date of death.
- Defense Finance & Accounting Services (800-269-5170).
- Office of Personnel Management (888-767-6738).
- Department of Veterans Affairs (800-827-1000).

For probate and estate administration assistance, please contact the Law Offices of Bryana Cross Bean by phone (253-327-3387) or email (attorneybean@outlook.com). We understand that this is a difficult time and will serve you with care and compassion. Our goal is to make this process as easy and straightforward as possible.