

After Losing Someone

An Important Checklist for A Difficult Time

Our team at Ishihara & Parker Law Firm, PLLC hopes this After Death Guide provides practical help to you and your family during an emotional time.

- Secure the **personal property** of the deceased. Including wallet, jewelry household items, car and residence.
- Order **Death Certificates**, 10-20 is often sufficient. This may take 2-8 weeks.
- Make **appointment** with Ishihara & Parker Law Firm PLLC to probate Will.
- **Locate** the Original Last Will & Testament.
- **Forward mail** from the residence, or secure pick up by discussing with a neighbor.
- **Gather any documents** for banks, financial institutions, life insurance, etc. and make a list of assets including accounts and accounts numbers.
- **Do a more thorough search** of the residence for items that need disposing (food) and items that need set aside (personal property that will go to beneficiaries).
- **Social Security will be notified** through the obtainment of a death certificate, however, if you are a surviving spouse you will need to make an appointment to make a spousal claim for benefits.
- **Consider** whether an estate sale will be necessary and contact them (this may take some time).
- **Consider** whether there will be a house or real estate property to sell and contact a realtor.
- **Talk to a CPA** about final personal return and any other tax filings.
- **If Decedent was over the required age**; be sure that the Required Minimum Distribution is taken from any qualified account(s) before the end of the calendar year.
- **Check Texas Unclaimed Property** for any property of the Decedent at www.claimittexas.gov



Important People to Notify

You may begin to make notifications of death immediately. If you are listed as a beneficiary, they will mail you claim forms:

- Any banks
- Any financial institutions or financial advisors
- Life Insurance policies
- Any pensions received or other income received into bank account
- Supplemental Insurance
- Utilities – to cancel or update name
- Credit Cards
- Any other payments drafted from or paid by bank account

**ISHIHARA
& PARKER**

LAW FIRM PLLC

(430) 625-3110

3000 HG Mosley Pkwy • Longview, TX 75605

LongviewEstatePlan.com

Make an appointment with Ishihara & Parker Law Firm PLLC to determine whether probate is necessary.