

What should I do when my loved one dies?

- 1. Ask for Help.** Let your friends and family help you. They can answer the phone, care for the home, and feed pets. Have someone you trust stay at home during the memorial service, to prevent possible break-ins.
- 2. Death Certificates.** Work closely with the funeral home to obtain certified copies of the death certificate. Certified copies are often required to apply for benefits or for proof of death when transferring property.
- 3. Estate Administration.** Notify the person named as the Trustee, Executor, or Personal Representative.
- 4. Mail.** If you are administering the estate, change the mailing address with the post office, so that mail comes to you. Invoices and statements that come in the mail will help you determine bills to be paid and potential assets.
- 5. Subscriptions.** Cancel newspaper and magazine subscriptions; these can indicate a home is empty.
- 6. Bills.** Cancel any unneeded automatic bill payments, such as phone service.
- 7. Will.** If there is a Will, it may have to be filed with the probate court before assets can be distributed.
- 8. No Will.** In Arizona, if there is no Will, statutes provide for the estate to go to the nearest next of kin.
- 9. Small Estates.** Arizona law permits some small estates to be administered without probate by using an affidavit.
- 10. Social Security Benefits.** To apply for death benefits, a Social Security number is needed. If you are a spouse, you will need a marriage license. If there are surviving minor or disabled children, you

will also need their birth certificates to apply for their benefits.

- 11. Life Insurance.** Check the records for any life insurance policies and contact the life insurance company regarding any possible benefits.
- 12. Bank Accounts.** If there are bank accounts, they may read “POD,” which means payable upon death, or “JTROS,” which means joint tenants with survivorship. If so, they may not belong to the estate.
- 13. Investments.** Check the records for any stocks, bonds, investment accounts, bank accounts, or other assets.
- 14. Employer Benefits.** If your loved one was employed, contact his or her employer; there may be some life insurance or other death benefits.
- 15. Other Benefits.** Explore whether there are benefits from the federal government, such as Civil Service or Veteran’s benefits.



LAW OFFICES

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With more than 175 years of combined experience in estate planning, wills, trusts, and probate, we can help you navigate these difficult times. Please call us to set up an appointment.

Evening and weekend appointments available.