



Below are the Items and Questions for the International Deceased Resolution Standards.
Revision descriptions from the last release are at the end of this file. Please visit www.DeathCenter.com
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Item Number	IDRS Item Description	Question Letter	Rev.
1	If out of country death, speak with Bureau of Consular Affairs and obtain legal representative.	A	Initial
2	Identify the two funeral homes involved and establish contacts at each.	A	Initial
3	Obtain required paperwork for transport of the body. (e.g. Death Certificate)	A	Initial
4	Ensure appropriate State regulations are followed for the States involved (e.g. embalming)	A	Initial
5	Determine if ground transportation is feasible, or if air will be used.	A	Initial
6	Coordinate body transportation (air & ground) back to home city funeral home.	A	Initial
7	Arrange for transfer from air or rail to local transport to funeral home (if required).	A	Initial
8	Confirm receipt of body and required documentation at home city funeral home.	A	Initial
9	Understand any religious or other customs and their impacts on related Items.	B	Initial
10	Determine if the Deceased wanted to donate their body to science or a body farm.	C	Initial
11	Discuss issue with spouse or other close family, and wishes. May have veto ability.	D	Initial
12	Check for an organ donor card or state organ registry (Department of Public Safety or DMV).	D	Initial
13	Follow-up to ensure specific organ or tissue donation executed or attempted to be executed.	D	Initial
14	Obtain confirmation of donation and any other details (e.g. recipients) for future reference.	D	Initial
15	Return body to family for burial. Arrange delivery to funeral home.	D	Initial
16	Determine if an autopsy was requested or required. Coordinate with officials.	E	Initial
17	Find and understand pre-paid funeral contracts or Funeral Insurance (aka Burial, Pre-Need).	F	Initial
18	Obtain funds from pre-paid contracts and insurance policies. Determine usage of proceeds.	F	Initial
19	Check for any funeral contributions from employers, organizations or retirement plans.	F	Initial
20	Determine if the grave / plot or columbarium has been selected.	F	Initial
21	Determine if the grave / plot or columbarium was already paid for, either fully or partially.	F	Initial
22	Find any instructions confirming cremation decisions, including any religious protocols.	G	Initial
23	Decision made on ashes to be interred, scattered or kept.	G	Initial
24	Inform funeral home/director of cremation decision.	G	Initial
25	Schedule any viewing of the deceased, if desired, before cremation.	G	Initial
26	Schedule the cremation.	G	Initial
27	Confirm who will witness the cremation.	G	Initial
28	Confirm the cremation was completed. Deliver personal effects to survivors.	G	Initial
29	Obtain the encased ashes.	G	Initial
30	Decide/identify location and spread ashes (if desired final decision). (1st Option)	G	Initial
31	Select & purchase an urn, ensure any religious affiliation compliance considered.	G	Initial
32	Deliver ashes to family member or other person (if the final decision) (2nd Option)	G	Initial
33	Send ashes to recipients via delivery service (e.g. USPS).	G	Initial
34	Transport and accompany ashes on a commercial airline.	G	Initial
35	If ashes are to be interred, determine the location (e.g. columbarium). (3rd Option)	G	Initial
36	Reserve and pay for location for the ashes.	G	Initial
37	Decide on information for plaque (e.g. Deceased name, dates, etc.)	G	Initial
38	Obtain plaque for urn location and have affixed.	G	Initial
39	Bury/inter ashes in the urn or other vessel in chosen location.	G	Initial
40	Register columbarium details with cemetery database and online databases.	G	Initial
41	Find, secure and understand any instructions confirming burial instructions/decisions.	H	Initial
42	Decide and request the body be embalmed (or not).	H	Initial
43	Decide on clothing & styling for body, ensure completed properly. Follow any religious protocols.	H	Initial
44	Select and pay for a casket, ensure complies with any religious specifications.	H	Initial
45	Decide if either a burial vault or grave liner is desired, and purchase.	H	Initial
46	Select a cemetery. Options include traditional, memorial parks or religion based.	H	Initial
47	Understand maintenance plans and any future required payments or fees.	H	Initial
48	Choose and purchase a grave plot (or determine if already selected and/or purchased).	H	Initial
49	Decide on information for headstones or plaque (e.g. name, dates, etc.).	H	Initial
50	Purchase headstone, plaque or marker & accessories.	H	Initial
51	Register grave details with cemetery database and online databases.	H	Initial
52	Find all documents for the Deceased's wishes on content and placement for public notice.	I	Initial
53	Determine if Deceased wrote or provided guidance on contents or a writer. Designate an editor.	I	Initial
54	Agree and approve of obituary and other public announcement wording.	I	Initial
55	Notify their place(s) of worship of their passing. (Ceremony coordination is in another item.)	I	Initial
56	Determine the guest list and publish service and / or send invitations.	I	Initial
57	Decide on a charity for donations in memory of the Deceased. List in publications and obituary.	I	Initial
58	Create a Crowdfunding listing either for the family and expenses, or a favorite charity.	I	Initial
59	Review any Crowdfunding sites created in the name of the Deceased, and ensure reputable.	I	Initial
60	Publish legal notice about the Estate for creditors if probate requires it.	I	Initial
61	Select Newspapers and request publication of obituary. Inform survivors of timing.	I	Initial
62	Write and post online notices of their passing (e.g. Legacy.com, Facebook).	I	Initial
63	Track and respond to any donations or gifts sent in honor of the deceased.	I	Initial
64	Find and understand any expressed desires of deceased related to a funeral service.	J	Initial
65	Identify and agree upon inclusion of any religious protocols for the service(s).	J	Initial
66	Reserve the location (e.g. place of worship, residence) and time. Coordinate with clergy.	J	Initial
67	Arrange for the body/casket to be transported to the location. Coordinate for graveside as well.	J	Initial
68	Coordinate spiritual leader(s) (e.g. preachers, priest, clergy, minister).	J	Initial
69	Request and coordinate with other speakers (e.g. family members for readings).	J	Initial
70	Decide and agree on any readings or other details for the service.	J	Initial
71	Request performer(s) for ceremony (e.g. singers, musicians). Decide on music.	J	Initial
72	Request and confirm pallbearers participation at service venue.	J	Initial

73	Determine the guest list and publish service and / or send invitations.	J	Initial
74	Create a registration book for the service.	J	Initial
75	Request cards (e.g. prayer cards) be made for the deceased.	J	Initial
76	Decide if open or closed casket during the service.	J	Initial
77	Coordinate clothing, jewelry and make-up instructions (e.g. uniforms).	J	Initial
78	Order or request flowers, plants or candles for the service.	J	Initial
79	Inform and schedule deliveries for recipient(s) of flowers and other items from all ceremonies.	J	Initial
80	Create or provide any videos or pictures for the service.	J	Initial
81	Hire a house-sitter for time of funeral (burglaries can be an issue).	J	Initial
82	Complete the memorial service.	J	Initial
83	Recover any items from the casket not to be buried (e.g. jewelry). Return to Estate.	J	Initial
84	Execute handoff (casket, transportation, motorcade) from service to graveside.	J	Initial
85	Find and understand any visitation instructions or preferences indicated by Deceased.	K	Initial
86	Identify and agree upon inclusion of any religious protocols for the viewing(s).	K	Initial
87	Determine if there will be multiple events (e.g. a visitation, post-Celebration of Life).	K	Initial
88	Decide on venue(s) for each and reserve, contract and pay.	K	Initial
89	Schedule a day(s) and time(s) for the visitation.	K	Initial
90	Schedule a day(s) and time(s) for the other events.	K	Initial
91	Decide if there will be a casket or urn, or no remains present at visitation.	K	Initial
92	Decide if open or closed casket (if casket is to be present).	K	Initial
93	Determine the guest list & invitees for all events.	K	Initial
94	Send invitations, reach out to invitees or publish the invitation to the events.	K	Initial
95	Decide and arrange any food, drink, music, flowers, videos, speakers or other event details.	K	Initial
96	Determine and inform recipient(s) of any leftover food or flowers. Arrange/coordinate delivery.	K	Initial
97	Ensure all contracts and bills related to events are paid/settled.	K	Initial
98	Decide if a graveside ceremony was in deceased wishes or family preference.	L	Initial
99	Include or communicate with desired invitees if contiguous with funeral.	L	Initial
100	Coordinate any procession, traffic, route or police escort issues with body transport.	L	Initial
101	Provide for any family travel to and from grave site.	L	Initial
102	Provide for transportation of other people (if required).	L	Initial
103	Request and confirm pallbearers requirement at graveside.	L	Initial
104	Invite officiant or other speakers. (Possibly same as memorial service).	L	Initial
105	Agree on any scriptures or other readings desired.	L	Initial
106	Request presence of the pallbearers (if required)	L	Initial
107	Deliver (and retrieve) any pictures, videos, memorials and flowers.	L	Initial
108	Request honor guard with bugler (if veteran).	L	Initial
109	Establish all possible names for the deceased for research, publications and informing.	M	Initial
110	Find, understand and list all documents found at deceased's residences, storage & work.	N	Initial
111	Request documents from their relatives and professional service providers. Create a list.	N	Initial
112	Review for any final instructions from deceased and/or Designated Agent forms.	N	Initial
113	Find and review any Healthcare Directive, Medical Directive or Living Will.	N	Initial
114	Identify and establish any name changes and related court documents.	N	Initial
115	Request or confirm Death Registration to County (Funeral Home should do/file).	N	Initial
116	Obtain Death Certificate (Certificate of Death Abstract), at least 10 copies.	N	Initial
117	Obtain a burial or cremation permit (funeral home should complete/file).	N	Initial
118	Identify, notify and speak with Healthcare Proxy / HIPPA agent.	N	Initial
119	Identify and deliver any personal letters for post-death distribution.	N	Initial
120	Find birth certificates (of all close family members).	N	Initial
121	Obtain credit reports and notify all 3 Credit Reporting Agencies. Provide Death Certificates.	N	Initial
122	Find and secure income related documents and statements for the current year.	N	Initial
123	Find and secure any IRS income tax returns (for the current and previous year).	N	Initial
124	Find and secure any other IRS, Financial or Legal documents.	N	Initial
125	Find and secure their Social Security card, or if unavailable, their Social Security number.	N	Initial
126	Find, return and cancel their Passport(s).	N	Initial
127	Find, notify and return driver's license to the Department of Motor Vehicles.	N	Initial
128	Make scans of documents, deliver or store for future access and identify who may need them.	N	Initial
129	Shred & dispose of all other paperwork when finished.	N	Initial
130	Determine if a will exists (first option)	O	Initial
131	Confirm there was not a valid will. (2nd option)	O	Initial
132	Review will (and amendments) for key information (e.g. assets, executor(s), beneficiaries).	O	Initial
133	Decide if filing for probate is required.	O	Initial
134	Establish state(s), and their laws, including UPC, will validity and intestate rules.	O	Initial
135	Determine what assets will not be part of probate. (e.g. trusts, TOD, joint assets)	O	Initial
136	Determine if any ancillary probates will be required. (e.g. for real estate in a 2nd state)	O	Initial
137	Evaluate if a Small Estate Administration or Affidavit is available, desired and feasible.	O	Initial
138	Determine if any executors (representatives, administrator) or backups were named.	O	Initial
139	Deliver documents to the court, including the will, proof of death form and death certificate.	O	Initial
140	Review list of beneficiaries in the will, contact each. Contact additional relatives.	O	Initial
141	Determine if any minors are in the will, establish a representative.	O	Initial
142	Obtain a waiver from beneficiaries for the bond and for Independent Administration.	O	Initial
143	Post notice of probate in the newspaper, courthouse & any databases. May be required.	O	Initial
144	Address any objections to the will or other issues.	O	Initial
145	For intestate (no will), hire attorney for unknown heirs & identify disinterested witnesses.	O	Initial
146	Have the will validated by court.	O	Initial
147	Confirm court has authorized someone for probate process, including an administrator.	O	Initial
148	Court issues Letters of Authority, Testamentary or Independent Executorship	O	Initial
149	Register any trusts. May not be compulsory, varies by state.	O	Initial
150	Get an EIN for the estate from the IRS. Will be required to file some tax forms.	O	Initial
151	Open estate bank account. May not need to do if Executor or others had a joint account.	O	Initial
152	Create estate brokerage accounts with financial planners for estate or beneficiaries.	O	Initial
153	Post a Bond, unless not required or court advises not to.	O	Initial
154	Collect, secure and maintain all property related to the Estate.	O	Initial
155	Take inventory of all of the assets. Enlist professional help if needed.	O	Initial
156	Identify and provide notice to all known creditors.	O	Initial

157	Provide proof of contact and public notice for beneficiaries and creditors.	O	Initial
158	Pay necessary fees and all valid claims of debts. Pay any specific bequests from the will.	O	Initial
159	Close probate and submit to court, receive permission to distribute remaining assets	O	Initial
160	Distribute remaining assets. Obtain receipts and file with courts to prove distribution.	O	Initial
161	Pay final executor fees and expenses.	O	Initial
162	Prepare and submit a final accounting of the Estate. Send to beneficiaries and creditors.	O	Initial
163	Prepare and submit probate closing statement to the court.	O	Initial
164	Obtain a release from duties for the Executor or Representative.	O	Initial
165	Close the estate bank account.	O	Initial
166	Identify the pets of the deceased, with the number and types, names, ages, etc.	P	Initial
167	Find any instructions made by deceased for their wishes regarding their pet(s).	P	Initial
168	Find, secure and understand any additional documents (e.g. adoption, sale, birth).	P	Initial
169	Identify and contact the emergency caregiver(s) for pets.	P	Initial
170	Find and secure any certified pedigree certificates (for breed/heritage proof).	P	Initial
171	Establish if pet is subject to any breed specific legislation (e.g. aggressive breeds).	P	Initial
172	Identify if any pets are exotics, have licensing requirements or restrictions.	P	Initial
173	Find any microchips and/or identification database registries and tracking numbers.	P	Initial
174	Locate and secure pets if with others / boarded, or ensure continuation until transition.	P	Initial
175	Identify and cancel any in-process pet adoptions.	P	Initial
176	Return any animals if they are a foster or were being cared for temporarily.	P	Initial
177	Set-up allowances for day-to-day care of pet before long-term transition.	P	Initial
178	Determine if the Will has a provision for pet as a beneficiary or funds for care.	P	Initial
179	Identify if there is a trust for the pet(s) or other animals, or to create one.	P	Initial
180	Determine disposition of any remaining funds after pet's death and where funds are to go.	P	Initial
181	Notify the Veterinarian(s), obtain records, keep informed of the process and transition.	P	Initial
182	Receive & transfer (to caretaker) any medical or pharma records, pharmaceuticals or OTC.	P	Initial
183	Transfer pets to permanent caretaker or to designated shelter or charity if any.	P	Initial
184	Identify/inform backup long-term caretaker, if specified. Possibly a shelter, foster.	P	Initial
185	Continue, end or transition any dog walking services. Ensure bills are continued or paid.	P	Initial
186	Continue, end or transition any pet boarding/sitting services. Settle payments.	P	Initial
187	Cancel or transition any pet food delivery (e.g. Chewy, Amazon, Petco, PetSmart)	P	Initial
188	Close out accounts on any pet websites (e.g. Wag!, brokers for sitting, walking etc.)	P	Initial
189	Cancel/settle any accounts with Pet stores.	P	Initial
190	Transition any pet products to caretaker (not in estate) (e.g. toys, carriers, supplies).	P	Initial
191	Notify, settle and/or transition any other services (e.g. grooming, training).	P	Initial
192	Cancel or transition any pet liability insurance (in case they do any damage).	P	Initial
193	Cancel or transition any pet medical insurance (for illnesses, procedures, etc.)	P	Initial
194	Find and review all information on their family, friends, associates & beneficiaries.	Q	Initial
195	Obtain names and contact information of closest family (all heirs) and friends.	Q	Initial
196	Create chart with current and former spouse(s), parents, children, grandchildren.	Q	Initial
197	Build a master list with everyone involved with contact information, especially relatives.	Q	Initial
198	Find and communicate the deceased's passing to master list with their beneficiary status.	Q	Initial
199	Refer family and friends to grieving support & counselors.	Q	Initial
200	Review the Will and/or State laws to identify beneficiaries.	Q	Initial
201	Ensure no specific disinheritance language exists, and determine any impact or legal validity.	Q	Initial
202	Contact all beneficiaries listed/identified. Determine for each if direct or an alternate.	Q	Initial
203	Determine if there is a provision for a residuary beneficiary and if yes, identify.	Q	Initial
204	Determine if any beneficiaries are bankrupt. Understand court and creditor issues.	Q	Initial
205	Identify and pay any family allowances from estate (e.g. divorce, child support).	Q	Initial
206	Find and understand all details of marriages, divorces and domestic partnerships.	R	Initial
207	Understand if State(s) uses community property or common law, plus other legal concerns.	R	Initial
208	Identify if there is a surviving spouse.	R	Initial
209	Find and resolve any community property agreements (splits without an official divorce).	R	Initial
210	Find and understand any survivorship agreements.	R	Initial
211	Determine if there was a simultaneous death issue.	R	Initial
212	Identify any past marriages, ex-spouses (if alive/remarried), and timing and resolutions.	R	Initial
213	Confirm any unmarried partners, LGBT, common law, other similar issues. Determine impacts.	R	Initial
214	Confirm marriage licenses or certificate information, include prior ones.	R	Initial
215	Obtain, confirm and review any Domestic Partnership Registration and/or agreements.	R	Initial
216	Find and review any nuptial agreements (e.g. pre-nuptials). Determine validity and impacts.	R	Initial
217	Identify and resolve any divorce issues and documentation (e.g. property settlements).	R	Initial
218	Identify and settle any alimony / spousal support. Determine estate's liability.	R	Initial
219	Confirm spouse(s) were US citizens, and if not review tax and other issues (e.g. QDOT).	R	Initial
220	Obtain and review all documents on children and dependents. Review for guardian decisions.	S	Initial
221	Determine who all of their children and dependents are, and key information on each.	S	Initial
222	For adopted or foster children, find court documents and notify agencies if required.	S	Initial
223	For children living with them, determine any custody/living changes (i.e. single parent).	S	Initial
224	For minors, establish guardians for day-to-day needs of children and their finances/support.	S	Initial
225	Confirm and/or establish long-term guardians for any minor children or dependents.	S	Initial
226	Find and decide to continue any daycare/childcare services or transfer to new caretaker.	S	Initial
227	Identify any disinheritance issues with any children. Understand the State laws.	S	Initial
228	Determine if any children or dependents are not US citizens, and understand impacts.	S	Initial
229	Establish who and how any property conveyed to children will be managed (e.g. trusts).	S	Initial
230	Identify any child support in place, including documents, payments and how they worked.	S	Initial
231	Ensure no other family allowances from estate. Obtain any recipients and amounts.	S	Initial
232	Notify schools (K-12, colleges) of any children. Pay balances owed and arrange for continuity.	S	Initial
233	Notify any car pools and children's key friends' parents.	S	Initial
234	Find, secure, understand all documents and information for any special needs children.	T	Initial
235	Identify any special needs dependents or children, and details of needs and situations.	T	Initial
236	Ensure special needs children & dependents receive proper benefits (e.g. long-term care).	T	Initial
237	Confirm chosen guardian has been notified and is ready to take over the role.	T	Initial
238	Establish proper caretaker or professionals, or transition to new interface.	T	Initial
239	Ensure any SSI (Supplemental Security Income) continues after Deceased's death.	T	Initial
240	Ensure that they receive any SSDI (Social Security Disability Income).	T	Initial

241	Confirm continuation of any State level disabled support benefits.	T	Initial
242	Confirm continuation of any Local (County, City, Town) level disabled support benefits.	T	Initial
243	Confirm continuation of any charity disabled support benefits.	T	Initial
244	Find/create a trust for special needs children or dependents (if requested or needed).	T	Initial
245	Communicate medication, health instruction or medical provider information to new caregivers.	T	Initial
246	Transfer medical support items or devices and documentation to new caregivers.	T	Initial
247	Determine if any professional clean up is necessary where the Deceased passed.	U	Initial
248	Find & understand all documents and information on legal & accounting professionals.	V	Initial
249	Identify and obtain contact information for key professionals.	V	Initial
250	Identify Executor or Representative choice. Contact them for coordination.	V	Initial
251	Contact Attorney, determine roles and activities they played. Determine if the Estate Attorney.	V	Initial
252	Contact Accountant or CPA, determine what roles and activities they played.	V	Initial
253	Find any Calendars of the deceased and cancel all of their appointments.	W	Initial
254	Determine Estate Solvency by comparing estate assets to debt.	X	Initial
255	Establish where they lived, and with who, who paid what, and whose names are on any lease.	Y	Initial
256	If they lived with others, notify and discuss how to transition and remove belongings.	Y	Initial
257	Confirm they only had a single residence, or identify locations if there are multiple.	Y	Initial
258	Find, secure, understand all documents related to lease or rent of real estate from others.	Y	Initial
259	Ensure any leases or commitments are terminated or scheduled to be.	Y	Initial
260	Notify Landlord(s) and discuss how to end the lease and clean out belongings. (if applicable)	Y	Initial
261	Stop any automatic rental payments (home, apartment, assisted living or nursing home).	Y	Initial
262	Stop any additional rental payments (e.g. group rental agreements, 3rd party, etc.)	Y	Initial
263	Ask local Police to periodically check on property if Deceased lived by themselves.	Y	Initial
264	Ensure all belongings requiring removal are distributed or relocated.	Y	Initial
265	Ensure any required repairs or cleaning to rentals are completed.	Y	Initial
266	Close out and exit property, returning all keys and complete a final walk-through.	Y	Initial
267	Recover any security deposits or buy-in fees for apartments, assisted living or other rentals.	Y	Initial
268	Find, secure, understand all documents related to real estate holdings and investments.	Z	Initial
269	Establish if they owned their primary residence. Confirm status, identify any co-owners.	Z	Initial
270	Identify additional real estate investments and participation. Create a master tracking list.	Z	Initial
271	Review all properties. Search for concerns/risks (environmental, zoning, code issues).	Z	Initial
272	Change any locks or security codes to ensure that only authorized people have access.	Z	Initial
273	Identify if any property has additional owners or liens, or was held jointly with Deceased.	Z	Initial
274	Check for any TOD (Transfer on Death) Real Estate. Review for feasibility then execute.	Z	Initial
275	Determine if there is any real estate inside of any trusts. Take any required action if needed.	Z	Initial
276	Find, research and build the cost basis for the properties and find any related documents.	Z	Initial
277	Establish any Tenancy by Entirety (jointly owned property, passes to spouse if other dies).	Z	Initial
278	Determine if any real estate will be gifted to children. Resolve tax or documentation issues.	Z	Initial
279	Hire handyman for repairs and/or professional stager to clean up house for appraisal/tours.	Z	Initial
280	Find any real estate appraisals, or if none exist, have completed if needed.	Z	Initial
281	Review any rental agreements and decide to continue or terminate. Notify renters.	Z	Initial
282	Notify and transfer any rental contract for renters of deceased-owned property.	Z	Initial
283	Notify and reconcile any dues with neighborhood, HOA or condo association(s).	Z	Initial
284	Schedule to continue to pay any mortgages or other expenses during the process.	Z	Initial
285	Hire real estate broker or agent (if selling the property). Work with them to close the sale.	Z	Initial
286	Determine if property is being passed to family. Establish the rules and assign payments.	Z	Initial
287	Sell or transfer ownership of any additional land properties.	Z	Initial
288	Identify or transfer any titles for home(s). Confirm not encumbered (mortgage, liens).	Z	Initial
289	For any real estate partnerships, sell or transfer ownership. Review/decide on options.	Z	Initial
290	Find any property tax records and statements (if not included in mortgage).	Z	Initial
291	File and pay any taxes on property (eg: ad valorem on personal property).	Z	Initial
292	Find, transfer or sell any timeshares, fractional ownership or vacation / holiday clubs.	Z	Initial
293	Find all security related information and devices / items (e.g. keys).	AA	Initial
294	Obtain and change keys / locks and codes for doors to any residences or other sites.	AA	Initial
295	Identify and record any home security services & passcodes (e.g. alarm companies).	AA	Initial
296	Obtain (and change if needed) any keys or codes for safes & locks (e.g. wall safe, bicycle).	AA	Initial
297	Extract and delete all passwords or encryption retained on devices or software.	AA	Initial
298	Obtain passwords to access other electronic devices (e.g. mobile phones PCs, tablets).	AA	Initial
299	Obtain passwords to any LAN(s) or Wifi(s). Shut down if required and return or retain hardware.	AA	Initial
300	Identify, obtain (and transfer, change or delete) passwords to online websites.	AA	Initial
301	Identify who lived with them, percent of time, their roles, where in home and how long.	AB	Initial
302	Review any documentation from the deceased and discuss with family and/or friends.	AB	Initial
303	Understand related laws regarding contracts and residential rights.	AB	Initial
304	Discuss the situation with assistants, their understanding and obtain any written materials.	AB	Initial
305	Obtain an inventory of property (e.g. furniture) in residence, including that of assistant(s).	AB	Initial
306	Decide if, when the assistant will leave residence, and what transition plan or timing.	AB	Initial
307	If they are to remain or acquire the residence, create a plan and documentation to facilitate.	AB	Initial
308	Eliminate any confusion between assistant's property and Estate's, particularly upon departure.	AB	Initial
309	Monitor & confirm departure of assistant with their property. Obtain keys or security devices.	AB	Initial
310	Change locks and security codes. Inform any HOA or any management of departure.	AB	Initial
311	Find, secure, understand all documents and information related to their last employer.	AC	Initial
312	Identify employer and notify their Human Resources department and direct supervisor.	AC	Initial
313	Coordinate with Human Resources (or other group) for close out process	AC	Initial
314	Request the Employer EIN (Employer Identification Number).	AC	Initial
315	Obtain personal effects from their office area or others under company control (e.g. storage).	AC	Initial
316	Return all company assets (e.g. laptops, keys/badges, phones, vehicles or other equipment).	AC	Initial
317	Ensure all company information (data, reports, etc.) is returned.	AC	Initial
318	Confirm there were no wage garnishments, and reconcile if there were.	AC	Initial
319	Calculate and collect any wages owed from employer.	AC	Initial
320	Notify and close employer health plan.	AC	Initial
321	Identify and collect any commissions owed deceased.	AC	Initial
322	Calculate and collect any vacation compensation owed, if policy allows.	AC	Initial
323	Identify and collect any expenses owed (e.g. travel).	AC	Initial
324	Identify and resolve any loans or other debts owed to Employer.	AC	Initial

325	Identify and obtain any life insurance proceeds provided by an employer.	AC	Initial
326	Find and obtain any corporate benefits, death benefits or future pension information.	AC	Initial
327	Investigate any federal or other government employment benefits. Obtain if feasible.	AC	Initial
328	Identify and collect any other miscellaneous items or amounts owed.	AC	Initial
329	Recover or transfer any 401k or other plans (403(b), 457).	AC	Initial
330	Recover deferred compensation outside of stock options, profit-sharing and pensions.	AC	Initial
331	Recover proceeds from any profit-sharing plans.	AC	Initial
332	Recover value from warrants or other stock option type items	AC	Initial
333	Review and recover any value from employer/retirement benefit (pension) plans.	AC	Initial
334	Find, secure, and understand all documents and information regarding taxes and filings.	AD	Initial
335	Contact CPA/Accountant(s) to request past 3 years of tax filings and support documents.	AD	Initial
336	Review information, if documentation not available, request records and transcripts.	AD	Initial
337	Determine responsible party to file and pay each return. Confirm court approvals if required.	AD	Initial
338	File Form 2848 Power of Attorney for CPA to contact IRS. (possibly more than one)	AD	Initial
339	Ensure IRS Form 56 is filed to confirm Personal Representative and any trustee changes.	AD	Initial
340	Track down all income and sources for Deceased. Collect all current/prior year receipts.	AD	Initial
341	Obtain or create an EIN for Estate and any new trusts with the IRS.	AD	Initial
342	Contact State agencies to confirm inheritance filings, with forms to file and deadlines.	AD	Initial
343	Obtain appraisals of all real property as of the date of death to establish new cost basis.	AD	Initial
344	Obtain brokerage statements at date of death with valuation of securities for new cost basis.	AD	Initial
345	Obtain qualified appraisals of personal property held, if of significant value.	AD	Initial
346	Obtain qualified valuations of any business interests owned to establish new basis of holdings.	AD	Initial
347	Prepare and file extensions for Federal and State(s) individual income tax returns.	AD	Initial
348	Prepare and file extensions for Federal and State(s) Estate and Trust income tax returns.	AD	Initial
349	Complete and file Federal Individual Income Tax Return (1040) for last calendar year.	AD	Initial
350	Complete and file State Personal Income Tax Return(s) (pre-death income items).	AD	Initial
351	Obtain IRS gift tax returns (Form 709 for all prior years). This is also the GSTT form.	AD	Initial
352	Determine if there are any GSTT (Generation Skipping Transfer Tax) issues.	AD	Initial
353	Determine if required, and if so, file Federal Gift Tax return (Form 709).	AD	Initial
354	Determine if required, and if so, file State Gift Tax returns.	AD	Initial
355	Identify and address issues regarding any foreign accounts that are part of the Estate.	AD	Initial
356	Complete and file Federal Estate Income Tax Return for Estates and Trusts. (Form 1041).	AD	Initial
357	Complete and file State Estate Income Tax Return(s) (post-death income items).	AD	Initial
358	Complete and file Federal Trust Income Tax Returns (Form 1041).	AD	Initial
359	Complete and file State Trusts (Income) Tax Return.	AD	Initial
360	Consider election of estate tax year combining Estate and Trust tax filings (Form 8855).	AD	Initial
361	Prepare & file extensions for Federal and state(s) Estate Tax returns.	AD	Initial
362	Complete and file Federal Estate Tax Return (Form 706), if required.	AD	Initial
363	Complete and file State Estate Tax Return, if required.	AD	Initial
364	Complete reporting of property to the IRS (Form 8971) within 30 days of filing Form 706.	AD	Initial
365	File Form 4810 for a prompt assessment and Form 5495 for discharge from personal liability.	AD	Initial
366	Obtain Tax Inheritance discount for early payment (only in a few states).	AD	Initial
367	Complete and file any needed State Inheritance Tax Return.	AD	Initial
368	Identify and pay any other taxes & fees to the City or Town government(s).	AD	Initial
369	Identify and pay any other taxes & fees to the County government(s).	AD	Initial
370	Determine if there is any Medicaid Recovery Act liability.	AD	Initial
371	File Form 4422 to release liens for real estate sales.	AD	Initial
372	Request IRS transcript for Form 706 filing using Form 4506-T.	AD	Initial
373	Obtain Estate Tax (Closing) Letters for Federal and the State(s).	AD	Initial
374	File Form 56, and any state equivalents, for discharge from personal representative role.	AD	Initial
375	Find, secure, understand all documents on prior Power of Attorney decisions and details.	AE	Initial
376	Understand who had any Power of Attorney given. Determine scope and actions taken.	AE	Initial
377	Notify and reach out to anyone who had Power of Attorney and obtain any relevant documents.	AE	Initial
378	Provide Executor Representative with documents. Affirm their authority in all future matters.	AE	Initial
379	Conduct a full Asset Search and UCC filings, including real estate.	AF	Initial
380	Find, secure, understand all documents about the crime related to their death.	AG	Initial
381	Obtain belongings, money or other items from hospital, home, ambulance or police (from scene).	AG	Initial
382	Discuss with any lawyers assigned to the case (e.g. Prosecutor, District Attorney).	AG	Initial
383	Review impact on the estate, particularly if any beneficiaries are known or suspected.	AG	Initial
384	If crime scene was on deceased property, coordinate the crime scene clean-up activities.	AG	Initial
385	Investigate any crime victim compensation available (e.g. State Agencies).	AG	Initial
386	Find and secure all documents regarding country of birth, past foreign citizenships and Visas.	AH	Initial
387	Determine country of birth and if the deceased had any dual citizenships.	AH	Initial
388	Obtain any immigration and/or alien registration papers / Visa. Notify the State Department.	AH	Initial
389	Find any immigration status if still in the courts or in process for consideration.	AH	Initial
390	Review any issues with spouses and children who are not citizens to qualify for citizenship.	AH	Initial
391	Request any foreign citizenship documentation and numbers. Notify any foreign governments.	AH	Initial
392	Determine country of birth and citizenship or Visa status for all spouses and children.	AH	Initial
393	Review any potential issues in resolving affairs due to citizenship or related issues.	AH	Initial
394	Find and understand all information regarding on-going or potential legal issues.	AI	Initial
395	Find their lawyer(s), law firms or legal advisor (e.g. friend). (if they had any)	AI	Initial
396	Contact their lawyers/law firm to understand current and potential issues (if any).	AI	Initial
397	Ask friends, family, co-workers, professional services about current/potential legal issues.	AI	Initial
398	Consult an attorney to see if there is possibility of a wrongful death lawsuit.	AI	Initial
399	Identify any on-going litigation where Deceased was a plaintiff. Forecast/recover compensation.	AI	Initial
400	Identify any on-going litigation where Deceased was a defendant. Forecast impacts.	AI	Initial
401	Identify any potential litigation with Deceased as a plaintiff. Forecast expectations.	AI	Initial
402	Identify any potential litigation with Deceased as the defendant. Forecast expectations.	AI	Initial
403	Identify any criminal litigation related to the Deceased, and potential estate impacts.	AI	Initial
404	Identify any pending criminal actions or cases regarding others with a possible impact.	AI	Initial
405	Identify potential class action litigation with Deceased as a plaintiff. Forecast expectations.	AI	Initial
406	Identify on-going class action litigation with Deceased as plaintiff. Forecast expectations.	AI	Initial
407	Identify any past settlements not yet paid out and impacts of passing on future compensation.	AI	Initial
408	Obtain belongings or other items from hospital, home, ambulance or police.	AJ	Initial

409	Find, secure, understand all documents on renting/leasing real estate from others.	AJ	Initial
410	Identify any dwellings, storage or other locations where physical goods are stored.	AJ	Initial
411	Find and return any loaned items. Identify and contact the owners for return.	AJ	Initial
412	Find and recover any consigned (or pawned) or borrowed items of the deceased.	AJ	Initial
413	Find and recover any assigned or loaned out items (e.g. to museums, schools).	AJ	Initial
414	Find and dispose of any soon to be perishable products (e.g. food items)	AJ	Initial
415	Find & secure any cash or currency. Log into the estate for disbursement.	AJ	Initial
416	Secure, store & distribute photos (family), videos and ancestry materials.	AJ	Initial
417	Find, pay and return any equipment rentals.	AJ	Initial
418	Find, pay and return any home furnishing rentals.	AJ	Initial
419	Complete/contract appraisals for higher value items, or lots of other items.	AJ	Initial
420	Find, delete and destroy any adult or illegal/controversial (e.g. drugs) items.	AJ	Initial
421	Review and decide on method to bulk sell goods (e.g. garage sale, liquidator).	AJ	Initial
422	Distribute, sell, donate or dispose of antiques.	AJ	Initial
423	Distribute, sell, donate or dispose of appliances.	AJ	Initial
424	Distribute, sell, donate or dispose of art (high value, collectibles and consumer).	AJ	Initial
425	Distribute, sell, donate or dispose of china, crystal and silver	AJ	Initial
426	Distribute, sell, donate or dispose of all clothes & linens.	AJ	Initial
427	Distribute, sell, or donate other collectibles.	AJ	Initial
428	Distribute, sell, donate or dispose of consumer electronics.	AJ	Initial
429	Distribute, sell, donate or dispose of furniture.	AJ	Initial
430	Distribute, sell, donate or redeem gift cards or other awards.	AJ	Initial
431	Distribute, sell, donate or dispose of jewelry.	AJ	Initial
432	Distribute, sell, donate or dispose of lawn/garden (e.g. mowers, snow blowers) items.	AJ	Initial
433	Distribute, sell, donate or dispose of medical & personal equipment.	AJ	Initial
434	Distribute, sell, donate or dispose of sporting goods or outdoor/camping equipment.	AJ	Initial
435	Distribute, sell, donate any sports tickets (e.g. seasons, seats).	AJ	Initial
436	Distribute, sell, donate any theater or entertainment tickets or passes.	AJ	Initial
437	Distribute, sell, donate or dispose of any tools (machine, shop, power, hand).	AJ	Initial
438	Distribute, sell, donate or dispose of videos, DVDs (non-family) and books.	AJ	Initial
439	Distribute, sell, donate or dispose of all other items not listed (e.g. kitchen items).	AJ	Initial
440	Ensure all funds from sales, receipts from donations are logged back into the estate.	AJ	Initial
441	Find, secure, understand all documents and information regarding home services.	AK	Initial
442	Find all current and former addresses for the deceased (at least the last 10 years).	AK	Initial
443	Change voicemail(s) & answering machines. Create new message to inform of passing.	AK	Initial
444	Ask someone to answer phone, respond to voicemails/texts or forward to another number.	AK	Initial
445	Find, stop or transfer any subscriptions for newspapers and magazines.	AK	Initial
446	Find, pay then close or transfer any cable or satellite TV bill(s).	AK	Initial
447	Find, pay then close or transfer cellular telephone, wireless or pagers bill(s).	AK	Initial
448	Find, pay then close or transfer electric utility bill(s).	AK	Initial
449	Find, pay then close or transfer gas utility bill(s).	AK	Initial
450	Find, pay then close or transfer heating oil delivery bill(s).	AK	Initial
451	Find, pay then close or transfer home telephone bill(s).	AK	Initial
452	Find, pay then close or transfer internet provider bill(s).	AK	Initial
453	Find, pay then close or transfer lawn & garden (including sprinkler) bill(s).	AK	Initial
454	Find, pay then close or transfer maid or cleaning bill(s).	AK	Initial
455	Find, pay then close or transfer handyman or repairman bill(s).	AK	Initial
456	Find, pay then close or transfer other service provider bill(s) (e.g. septic, chimney, snow).	AK	Initial
457	Find, pay then close or transfer sewage bill(s) (if separate from water).	AK	Initial
458	Find, pay then close or transfer trash collection bill(s) (may be government agency).	AK	Initial
459	Find, pay then close or transfer water account. This could be a government agency.	AK	Initial
460	Find, pay then close or transfer meal providers (meals on wheels, delivery services, cooks).	AK	Initial
461	Cease, transfer and get credits for any cooperatives (e.g. food, electricity, etc.)	AK	Initial
462	Notify, liquidate or transfer any pre-paid service agreements. Recover any eligible refunds.	AK	Initial
463	Notify, liquidate or transfer any pre-paid warranties. Recover any eligible refunds.	AK	Initial
464	Find, secure, understand all documents and information regarding any firearms.	AL	Initial
465	Obtain any required combinations or keys for weapon or storage security.	AL	Initial
466	Search for firearms or storage places, e.g. gun lockers. Gather & secure all.	AL	Initial
467	Understand if any firearms have state law restrictions or are fully automatic.	AL	Initial
468	Identify, find and secure any Firearm Licenses. Notify Government agencies.	AL	Initial
469	Review to see if a Gun Trust had been created.	AL	Initial
470	Find any replicas, inert explosives or other potentially dangerous items.	AL	Initial
471	Dispose of firearms and other items through transfer or sale.	AL	Initial
472	Arrange for disposal of any items not sold or transferred.	AL	Initial
473	Find, secure, understand all information regarding internet activity & accounts.	AM	Initial
474	Review emails, bookmarks and any PC files to help identify online accounts of Deceased.	AM	Initial
475	Create a Digital Legacy, include any materials the Deceased or survivors / friends requested.	AM	Initial
476	Identify and have access to all social media accounts.	AM	Initial
477	Post notice on social media. Notify groups where Deceased was an owner or active.	AM	Initial
478	Shut down any social media accounts to be exited. Save selected media (files, pictures).	AM	Initial
479	Find, save records and shut down any financial services accounts.	AM	Initial
480	Find, transfer funds and close online banking/finance accounts (e.g. PayPal/Venmo).	AM	Initial
481	Find, save files and shut down any online healthcare accounts. (doctor groups, drugs, tracking)	AM	Initial
482	Find and shut down eCommerce accounts or orders. Locate deliveries & stop auto-orders.	AM	Initial
483	Save files, and transfer or shut down any storage and file sharing (e.g. Dropbox, iCloud).	AM	Initial
484	Save files, and transfer or shut down any photo sharing & storage (e.g. Shutterly, Flickr).	AM	Initial
485	Transfer any online genealogy accounts to a family member (e.g. Ancestry.com).	AM	Initial
486	Redeem (or transfer) and then shut down any travel, credit card or retailer loyalty accounts.	AM	Initial
487	Shut down any online books accounts (e.g. Kindle, Audible, Audiobook, Apple Books).	AM	Initial
488	Shut down any online gaming accounts (e.g. Minecraft, Xbox, PlayStation).	AM	Initial
489	Shut down any online music services (e.g. Spotify, iTunes, Pandora).	AM	Initial
490	Shut down any online dating services (e.g. Match, eHarmony). Notify connections of passing.	AM	Initial
491	Shut down any video streaming and TV services (e.g. Netflix, Hulu, AT&T TV).	AM	Initial
492	Identify and transfer any websites they owned (e.g. GoDaddy, Newtek).	AM	Initial

493	Identify and transfer or shut down any hosting services (e.g. Amazon AWS, 1&1, Godaddy).	AM	Initial
494	Transfer or sell/auction any internet domains. Notify domain registrars (e.g. GoDaddy).	AM	Initial
495	Shut down or transfer accounts for real estate or asset sharing services (e.g. AirBnB, Turo).	AM	Initial
496	Shut down all other online accounts (e.g. job search, food delivery, pharmacy cards).	AM	Initial
497	Find, secure, understand and list all documents related to medical issues and providers.	AN	Initial
498	Find all information on their Healthcare history, examples: conditions, status, resolutions.	AN	Initial
499	Identify and notify their Doctors (find General Practitioner, Specialists and Dentist).	AN	Initial
500	Obtain, pay final and close all doctor bills & accounts.	AN	Initial
501	Find, notify and pay any psychiatrist and mental health support accounts.	AN	Initial
502	Notify & close out all other Medical services (home health, therapists, etc.). Pay final bills.	AN	Initial
503	Find and pay any medical laboratory bills.	AN	Initial
504	Pay any open hospital bills.	AN	Initial
505	Find and destroy all prescriptions, medicines and opened OTC medical products.	AN	Initial
506	Find and cancel all prescriptions, medicines and optometry. Close pharmacies accounts.	AN	Initial
507	Obtain, close and/or transfer any Health Savings Accounts (HSA).	AN	Initial
508	Ensure all insurance and other submittals are filed and paid back to the estate.	AN	Initial
509	Identify and determine if there are any professional or personal service providers to notify.	AO	Initial
510	Find, secure, understand all information related to charities and other organizations.	AP	Initial
511	Identify and notify any charities they volunteered with.	AP	Initial
512	Identify and notify any organizations they gave donations to in the past.	AP	Initial
513	Establish a crowdfunding site, either for the family or for a charitable cause.	AP	Initial
514	Agree on, or establish a donation organization for the deceased. Include in public notices.	AP	Initial
515	Determine if there are any donor advised funds or giving accounts.	AP	Initial
516	Create a foundation if was the Deceased had desired. Find out if any already exist.	AP	Initial
517	Identify and resolve any giving programs/matching programs. (i.e. employer, owned business)	AP	Initial
518	Review any bequests, example, to colleges/schools either on death or being paid over time.	AP	Initial
519	Ensure any gifts to charities in the will or are executed and documented.	AP	Initial
520	Determine if will has a residuary clause designating charities. Distribute final proceeds.	AP	Initial
521	Notify any schools or universities they attended (alma maters).	AQ	Initial
522	Notify, pay or receive refunds for any schools they are currently enrolled in.	AR	Initial
523	Identify, notify & attempt to redeem or transfer credits from Frequent Flyer / Hotel programs.	AS	Initial
524	Find and understand all information on groups, activities and professional associations.	AT	Initial
525	Identify any group leadership roles and responsibilities, including non-for-profit Boards.	AT	Initial
526	Identify, notify and obtain any benefits from fraternal orders or other similar groups.	AT	Initial
527	Notify and close any health clubs (gyms, tennis, YMCA) or other (e.g. massage memberships).	AT	Initial
528	Notify and transfer or exit social clubs (e.g. country club, Lodges (Elk, Moose)).	AT	Initial
529	Identify, notify and cancel Trade/Industry memberships, professional societies.	AT	Initial
530	Identify, notify and stop dues for other groups & organizations. (e.g. HOA, political, alumni).	AT	Initial
531	Sign-up for the Do Not Contact list for marketers and telemarketers.	AU	Initial
532	Find, secure, understand all documents and information on bank accounts and activity.	AV	Initial
533	Identify the banks where they had accounts or might have had accounts.	AV	Initial
534	Contact the banks to confirm or research all of the assets and accounts on file.	AV	Initial
535	Obtain or download account history (12 months if possible). Find autopays & other payments.	AV	Initial
536	Find and secure any ATM, credit and debit cards.	AV	Initial
537	Find and secure any checkbooks and passbooks.	AV	Initial
538	Execute any Transfer on Death (TOD) designations if they were specified.	AV	Initial
539	Remove name from checks and get new checks re-issued given they may be refused.	AV	Initial
540	Remove name from joint bank accounts	AV	Initial
541	Record final transaction date and amount from each account by deceased.	AV	Initial
542	Find all bank safety deposit boxes, locations, where to find keys, names of authorized users.	AV	Initial
543	Empty all bank safety deposit boxes and close.	AV	Initial
544	Notify and close or transfer any autobill against bank accounts (credit cards or credit lines).	AV	Initial
545	Shut down online banking or redo password. Review local laws and restrictions for this.	AV	Initial
546	Notify and close bank checking accounts.	AV	Initial
547	Notify and close bank savings accounts.	AV	Initial
548	Find, secure, understand all documents and information on loans, debts and finances.	AW	Initial
549	Ask Deceased's family and friends about debts, including personal or non-traditional.	AW	Initial
550	Determine if the State(s) are Community Property and if there is a surviving spouse.	AW	Initial
551	Establish a debt claims deadline (each State has different rules). Post in Newspapers.	AW	Initial
552	Review and pay any claims from other creditors, including those from Newspaper notifications.	AW	Initial
553	Obtain credit card history for last 12 months if possible from all cards (may be online).	AW	Initial
554	Obtain credit reports from all three major bureaus. Notify them of death to freeze credit.	AW	Initial
555	Review all credit card balances, decide which or all to pay and submit payment.	AW	Initial
556	Notify and shut down all credit card accounts (Majors: VISA, Amex, MasterCard, Diners).	AW	Initial
557	Notify and close any debit card or pre-paid card accounts. If joint account, remove deceased.	AW	Initial
558	Pay mortgage(s) until properties are sold or mortgages are transferred.	AW	Initial
559	Determine if there is a mortgage life insurance policy and obtain proceeds.	AW	Initial
560	Continue paying mortgages. Pay off or transfer 2nd mortgages or equity lend lines (HELOC).	AW	Initial
561	Find any reverse mortgages, establish if Deceased was last surviving borrower.	AW	Initial
562	Payoff reverse mortgage or allow lender to take ownership if last surviving borrower.	AW	Initial
563	Review any student loan documentation for accounts they paid on or were a cosigner.	AW	Initial
564	Review any student loans owed being paid by the Deceased for discharge or settlement.	AW	Initial
565	For loans they cosigned, notify borrower and ensure lender requirements are understood.	AW	Initial
566	For loans they cosigned, review actions needed and if estate will become new cosigner.	AW	Initial
567	Determine if the estate needs to pay off any jointly signed loans, or exit liability.	AW	Initial
568	Find and close out any other bank credit lines.	AW	Initial
569	Notify and close out any non-bank credit lines (e.g. payday loans).	AW	Initial
570	Notify and close out any store credit cards (or other non-branded cards).	AW	Initial
571	Find P2P lending accounts, close out loans, recover any funds owed & delete account.	AW	Initial
572	Find and close out any outstanding lay-away payments, or return merchandise.	AW	Initial
573	Find all documents related to non-qualified financial accounts or assets (stocks, bonds).	AX	Initial
574	Identify any financial planner, wealth manager or brokerage accounts and contacts.	AX	Initial
575	Identify all financial products and details, along with locations.	AX	Initial
576	Determine which if any have joint ownership, with whom.	AX	Initial

577	Obtain Testamentary Letters and/or Death Certificate copies (at least 10) to provide.	AX	Initial
578	Stop any transactions that have not been executed, if necessary.	AX	Initial
579	Find, transfer or sell any certificates of deposits.	AX	Initial
580	Find, transfer or sell any savings bonds.	AX	Initial
581	Find, transfer or sell any corporate bonds.	AX	Initial
582	Find, transfer or sell any municipal bonds.	AX	Initial
583	Find, transfer or sell any treasury bonds or notes.	AX	Initial
584	Find, transfer or sell any money market funds.	AX	Initial
585	Find, transfer or sell any mutual funds.	AX	Initial
586	Find and transfer or sell any annuities. Identify beneficiaries.	AX	Initial
587	Find, transfer or sell any Treasury Bills (T-Bills).	AX	Initial
588	Find, transfer or sell any stocks (with certificates).	AX	Initial
589	Find, transfer or sell all other financial assets. Consult accounts and wealth managers.	AX	Initial
590	Ensure all accounts related to non-qualified plans are closed out or transferred.	AX	Initial
591	Find all documents for any qualified financial accounts (Pensions, 401Ks) and IRAs.	AY	Initial
592	Identify any financial planner, wealth manager or brokerage accounts and contacts.	AY	Initial
593	Identify all financial products and details, along with locations.	AY	Initial
594	Determine which if any have joint ownership, with whom.	AY	Initial
595	Obtain Testamentary Letters and/or Death Certificate copies (at least 10) to provide.	AY	Initial
596	Transfer or close any 529 Plans. Identify beneficiary and transfer or liquidate.	AY	Initial
597	Find and sell or transfer any non-Roth IRAs (SEP, Traditional Bank, etc.).	AY	Initial
598	Find and sell or transfer any Keogh Plans.	AY	Initial
599	Find and sell or transfer any Roth IRAs.	AY	Initial
600	Find and liquidate any 403b tax sheltered annuities.	AY	Initial
601	Find, transfer or sell any other qualified plans not specified. Consult wealth managers.	AY	Initial
602	Ensure any wealth or brokerage accounts for qualified plans are closed or transferred.	AY	Initial
603	Find, secure, understand all documents and information related to insurance and policies.	AZ	Initial
604	Identify and contact their main Insurance agent/broker, if they had one.	AZ	Initial
605	Find any life insurance policy(s) purchased by Deceased. Find signed contract(s) to collect.	AZ	Initial
606	Find and collect any life insurance from any business they may have been an owner of.	AZ	Initial
607	File to collect any life insurance from their most recent or previous employer(s).	AZ	Initial
608	Find any life insurance policies that are not part of the estate and support collection.	AZ	Initial
609	Find, request, collect/cancel any accident or other related insurance from an employer.	AZ	Initial
610	Find, request, collect/cancel any accidental insurance (payout to cover cost of injury).	AZ	Initial
611	Find, request, collect/cancel any accidental death & dismemberment insurance.	AZ	Initial
612	Find, receive any amounts owed (outstanding reimbursements from healthcare providers).	AZ	Initial
613	Identify and cancel any healthcare, pharmaceutical or dental insurance.	AZ	Initial
614	Identify and cancel any Medicare supplemental (Medigap) insurance.	AZ	Initial
615	Find, collect any balance (if whole life LTC) and close any long term care insurance.	AZ	Initial
616	Find and collect on any terminal illness healthcare insurance.	AZ	Initial
617	Find and close/liquidate/transfer any life insurance policy the Deceased had on other people.	AZ	Initial
618	Find, continue and/or transfer/close any homeowner/renter insurance.	AZ	Initial
619	Find and cancel any other property insurance policies (e.g. personal article, boat, flood)	AZ	Initial
620	Find, cancel or modify car / auto insurance, including GAP Insurance.	AZ	Initial
621	Find and cancel any umbrella/catastrophe insurance (extra liability insurance).	AZ	Initial
622	Find, collect and cancel any credit or credit card insurance.	AZ	Initial
623	Find, request, cancel/collect any disability policy (payments to cover lost wages).	AZ	Initial
624	Find and collect any outstanding travelers insurance.	AZ	Initial
625	Review all insurance policies and payments, request refunds owed (example pre-payments).	AZ	Initial
626	Ensure any other insurance items not already covered were not forgotten.	AZ	Initial
627	Find, secure and understand all documents for any vehicles and their equipment.	BA	Initial
628	Create a list of any vehicles with supporting information (e.g. VIN) and locations.	BA	Initial
629	Confirm ownership of vehicles and identify joint owners or encumbrances.	BA	Initial
630	Find any vehicle related financial debts (i.e. loans), payment plans or note documentation.	BA	Initial
631	Gather up any keys or other supporting equipment or devices.	BA	Initial
632	Find any vehicle maintenance records (e.g. oil change history) and inspection proof/date.	BA	Initial
633	Determine if any TOD (Transfer on Death) for any vehicles and their registrations.	BA	Initial
634	Exit or transfer any car/other vehicle leases.	BA	Initial
635	Sell, distribute or donate vehicles. (e.g. cars, trucks, motorcycles, boats, planes).	BA	Initial
636	Find and transfer car titles.	BA	Initial
637	Find and transfer other titles (e.g. boat, RV/Recreational Vehicles, plane, motorcycles).	BA	Initial
638	Find, then transfer or return license plates (depends on disposition of the vehicle(s))	BA	Initial
639	Find, then return any handicap stickers (if on plate then goes on the plate list item)	BA	Initial
640	Find, then transfer or cancel/return registrations (depends if selling or giving to someone).	BA	Initial
641	Find, then return or cancel any parking permits (e.g. office, community).	BA	Initial
642	Notify, pay, close or transfer tolltag accounts (e.g. toll authority or EZPass).	BA	Initial
643	Identify, transfer or sell any parking spots or garage spaces (owned).	BA	Initial
644	Identify, transfer and close any parking spots or garage spaces (rented).	BA	Initial
645	Find and cancel any automobile club memberships or roadside assistance (e.g. AAA).	BA	Initial
646	Transfer, close out and recover funds for pre-paid automotive maintenance programs.	BA	Initial
647	Determine if they had a pilot's license. Notify the FAA.	BA	Initial
648	Sell, transfer or exit any fractional vehicle ownerships (e.g. planes).	BA	Initial
649	Find, secure, understand all documents and information regarding trusts.	BB	Initial
650	Create a detailed list of trusts, along with the preliminary attributes of each.	BB	Initial
651	Obtain or create TINs/EINs for all the trusts, and add to the master trust list.	BB	Initial
652	For each trust, identify the grantor, objectives, assets included and the beneficiaries.	BB	Initial
653	Establish the trustee(s) for each, along with any named successor trustees.	BB	Initial
654	Determine the State or jurisdictional law for each. Review rules in all documents.	BB	Initial
655	Validate each trust to ensure no complications impacting administration or distribution.	BB	Initial
656	Confirm any timing provisions and constraints of the trusts, and if any are on-going.	BB	Initial
657	Determine if each trust is revocable, irrevocable or testamentary.	BB	Initial
658	Determine if the trusts are simple or complex.	BB	Initial
659	Determine if any of the trusts are blind, silent or quiet.	BB	Initial
660	Review the beneficiaries to understand if any of the trusts are pooled or for a group.	BB	Initial

661	Review the objectives for any spendthrift or special/supplemental needs provisions.	BB	Initial
662	Review the distributions for any discretionary, flexible or sprinkling clauses or language.	BB	Initial
663	Confirm all trusts are solvent. Identify potential liabilities, forecast any solvency risks.	BB	Initial
664	Ensure any funeral insurance trusts are liquidated and funds properly applied.	BB	Initial
665	Ensure any marital/spousal related trusts are properly administered and distributed.	BB	Initial
666	Ensure living trusts are properly administered and distributed, including disclaimers.	BB	Initial
667	Ensure any child/minor/family related trusts are properly administered and distributed.	BB	Initial
668	Ensure any education trusts, including Coverdell ESAs, are administered and distributed.	BB	Initial
669	Ensure any dynasty trusts (e.g. GST) are properly administered and distributed.	BB	Initial
670	Ensure any life insurance trusts are properly administered and distributed.	BB	Initial
671	Ensure any grantor trusts (e.g. GRAT, GRUT, GRIT) are properly administered and distributed.	BB	Initial
672	Ensure any charitable trusts (e.g. Lead, CRUT, CRAT) are properly administered and distributed.	BB	Initial
673	Ensure asset protection trusts (Foreign or Domestic) are administered and distributed.	BB	Initial
674	Ensure Medicaid asset protection trusts (MAPTs) are administered and distributed.	BB	Initial
675	Identify and distribute any Totten trusts (Payable on Death (POD) bank account).	BB	Initial
676	Ensure any pet/animal trusts are properly administered and distributed.	BB	Initial
677	Research any other types of trusts, and ensure properly administered and distributed.	BB	Initial
678	Determine if there are any constructive or resulting trusts, and ensure resolved properly.	BB	Initial
679	Ensure Schedule K1s are provided each year to any trust beneficiaries requiring receipt.	BB	Initial
680	Cancel any Trustee/Surety Bonds no longer needed.	BB	Initial
681	Determine and identify if they were eligible for any Federal government retirement benefits.	BC	Initial
682	Find, secure, understand all documents related to any cryptocurrency or DeFi activities.	BD	Initial
683	Search for cryptocurrencies on any personal off-line storage media.	BD	Initial
684	Search for cryptocurrencies on any personal on-line accounts (e.g. Coinbase).	BD	Initial
685	Find any cryptography keys or information to enable access. Identify others who have them.	BD	Initial
686	Determine ownership stakes for any joint holdings for the estate.	BD	Initial
687	Determine cost and market value of all cryptocurrencies or DeFi owned.	BD	Initial
688	Decide whether to liquidate or transfer all cryptocurrencies or DeFi assets to beneficiaries.	BD	Initial
689	Find, secure, understand all documents and information on owned or invested businesses.	BE	Initial
690	Identify and find any business interests held, financial statements and contracts, etc.	BE	Initial
691	Search for corporate entities that they associated with.	BE	Initial
692	Determine ownership level in each business, their structure and legal basis.	BE	Initial
693	Review Will or other documents for directions on disposition of business ownership and assets.	BE	Initial
694	Find any Buy Sell Agreements for the businesses.	BE	Initial
695	Identify any Trusts, existing or planned for after death (e.g. grantor retained, charitable).	BE	Initial
696	Determine ownership of any individual assets requiring review (jointly held, with whom).	BE	Initial
697	Find and clarify any warranties or guaranties for any assets that are to be kept or sold.	BE	Initial
698	Identify, close or transfer any debts between the Deceased and the businesses.	BE	Initial
699	Find or request a valuation of each business and their ownership when required.	BE	Initial
700	Return any company physical assets (e.g. personal computers, vehicles or other equipment).	BE	Initial
701	Obtain any assets or compensation due from all owned businesses.	BE	Initial
702	Ensure Deceased's share of any Accounts Receivable is received or will be in future.	BE	Initial
703	Return all information (e.g. reports, data) to companies from offsite or home locations.	BE	Initial
704	Find and resolve any open contracts for businesses which Deceased was involved.	BE	Initial
705	Modify, collect or cancel any business insurance policies (e.g. D&O, E&O, Key Man, etc.).	BE	Initial
706	Find, close and transfer any in-process work or deals involving the Deceased.	BE	Initial
707	Decide on transaction(s) needed regarding the business (e.g. transfer, liquidation).	BE	Initial
708	Sell and distribute the assets and/or the possessions of companies to be liquidated.	BE	Initial
709	Identify and transfer any titles for buildings/offices or other major assets.	BE	Initial
710	Identify, transfer or close/cancel any dba/fbn if required.	BE	Initial
711	Transfer or sell any domains (internet) related to businesses they owned or controlled.	BE	Initial
712	Transfer, close or liquidate any MLM downline (inform company, settle balance).	BE	Initial
713	Identify and exit Partnerships, LP & LLCs. Review partnership agreement(s) for guidance.	BE	Initial
714	Identify and close any S-Corps.	BE	Initial
715	Identify and close any Sole Proprietorships.	BE	Initial
716	Confirm all businesses were either exited or closed.	BE	Initial
717	Find and understand all documents and information on family roles in businesses.	BF	Initial
718	Discuss and confirm details of family involvement with family and business employees.	BF	Initial
719	Confirm the business(es) qualify as family businesses.	BF	Initial
720	Evaluate individual(s) who will inherit the business for past & planned company roles.	BF	Initial
721	Review any succession plan(s) or instructions. Discuss with other owners.	BF	Initial
722	Decide how to sell, transfer or gift the business to the inheritor.	BF	Initial
723	Review and understand any preparations the Deceased took regarding tax implications.	BF	Initial
724	Review and ensure all other owned businesses items are closed out.	BF	Initial
725	Find, secure all documents and information for unions, profession, trade or licenses.	BG	Initial
726	Notify any license issuers of their passing. Ensure payments stopped.	BG	Initial
727	Establish if they were ever a union member, identify union, which branch and number.	BG	Initial
728	Discover if union has any benefits or pension. Notify union of Deceased's passing.	BG	Initial
729	Identify any professional trade organization membership. Check for benefits, notify.	BG	Initial
730	Obtain and review all documents (e.g. 1099s) and information for any additional employment.	BH	Initial
731	Identify any contract work, gig services, web platforms, temporary or staffing firms.	BH	Initial
732	Research all potential non-full-time employers and contact/notify of passing.	BH	Initial
733	Request copies of any tax documentation to be sent to the Executor or Accountants.	BH	Initial
734	For professional services, inform both current and recent/past clients.	BH	Initial
735	Exit any in-process proposals or projects. Deliver interim work. Obtain partial compensation.	BH	Initial
736	Determine if the deceased had any property due or open requirements for any of firms.	BH	Initial
737	Determine if any money is owed to the deceased. Facilitate its collection.	BH	Initial
738	Deactivate and delete any Gig work accounts, including online. Execute close-out process(es).	BH	Initial
739	Find, secure, understand all documents and information regarding previous employers.	BI	Initial
740	Establish if they had any prior employers. Review records, ask family.	BI	Initial
741	Identify and obtain any life insurance proceeds provided by prior employer(s).	BI	Initial
742	Find out and obtain any corporate benefits, or death benefits.	BI	Initial
743	Investigate any Federal or other government employment benefits. Obtain if feasible.	BI	Initial
744	Recover 401k or other plans (403(b), 457).	BI	Initial

745	Identify and review any past pension records with former employer(s).	BI	Initial
746	Recover employer/retirement benefit (pension) plans from past employer(s).	BI	Initial
747	Execute or transfer stock options.	BI	Initial
748	Recover value from warrants or other stock option type items.	BI	Initial
749	Find, secure, understand all documents and information for any intellectual property.	BJ	Initial
750	Determine if they had licensed any of their own IP, or were licensing any IP from others.	BJ	Initial
751	Determine if they had transferred ownership of any intellectual property they held.	BJ	Initial
752	Identify if there are any terms/restrictions of use instructions from the deceased.	BJ	Initial
753	Identify any designations of transfer (e.g. in the will), including the beneficiary and IP.	BJ	Initial
754	Review all known intellectual property to determine if sole owners, or if not, with who.	BJ	Initial
755	Find and transfer/sell any copyrights or materials with copyrights.	BJ	Initial
756	Determine if they had any inventions, their ownership and what to do/who to transfer to.	BJ	Initial
757	Find and transfer/sell any awarded patents.	BJ	Initial
758	Find and transfer/sell any royalties from awarded patents.	BJ	Initial
759	Identify and transfer/continue/abandon any patent applications currently in process.	BJ	Initial
760	Find and transfer/sell any awarded trademarks they owned.	BJ	Initial
761	Find and transfer/sell any royalties from issued trademarks.	BJ	Initial
762	Identify and transfer/continue/abandon any trademark applications currently in process.	BJ	Initial
763	Find and transfer/sell any royalties from likeness, image, name (for celebrities).	BJ	Initial
764	Find and transfer/sell any royalties from songs, movies, TV shows, plays, books, games, etc.	BJ	Initial
765	Find & discuss any trade secrets, and their uses and options. Transfer/license if applicable.	BJ	Initial
766	Identify and determine if the Deceased had any crowdfunding accounts.	BK	Initial
767	Find, secure, understand all information regarding any non-litigation legal issues.	BL	Initial
768	Find and obtain any Legal Plans compensation support available from all sources.	BL	Initial
769	Search bankruptcy records, if deemed applicable. Federal Court records will have these.	BL	Initial
770	Search for liens and judgments.	BL	Initial
771	Identify and settle any court judgments (i.e. debts).	BL	Initial
772	Identify then transfer or sell any court judgments (i.e. awards).	BL	Initial
773	Identify then transfer or exit any contracts (open personal, not owned businesses or employer).	BL	Initial
774	Identify and document any Tax Issues, including from past returns.	BL	Initial
775	Find and secure all documents on Federal government benefits or agencies to notify.	BM	Initial
776	Confirm Federal government agencies requiring notification to resolve benefits.	BM	Initial
777	Notify Post Office (USPS) and private mail locations of death, cancel any P.O. Boxes.	BM	Initial
778	Submit a mail forwarding address to USPS and others if vacating a home.	BM	Initial
779	Identify and collect residual funds, including Medicaid burial benefits, from MSAs and HSAs.	BM	Initial
780	Notify Social Security Administration, and ensure they are aware of military service.	BM	Initial
781	Return final Social Security check. (SSA does not prorate for month of death).	BM	Initial
782	Request Social Security Survivor Benefits (not one time death benefit, but for spouses/kids).	BM	Initial
783	Collect Social Security one time death/funeral benefit (if applicable and survivors qualify).	BM	Initial
784	Research and obtain any unclaimed property (e.g. Government, other sources).	BM	Initial
785	Inform the Internal Revenue Service (IRS) in writing.	BM	Initial
786	Notify and close any Medicaid account.	BM	Initial
787	Notify and close any Medicare account. Recover any due reimbursement funds.	BM	Initial
788	Contact United States Treasury to check if registered owners of any bonds or other assets.	BM	Initial
789	Inform Pension Benefit Guaranty Corporation (PBGC) for any current or future pension issues.	BM	Initial
790	Close out or transfer benefits due from Pension Benefit Guaranty Corporation (PBGC).	BM	Initial
791	Notify Department of Agriculture and transfer/cancel SNAP (i.e. food stamps) or other benefits.	BM	Initial
792	Notify Health & Human Services regarding changes / transfer to any TANF payments or account.	BM	Initial
793	Notify U.S. Fish & Wildlife regarding any hunting licenses or stamps.	BM	Initial
794	Notify any Federal agencies where the deceased had security clearances, and also the FBI.	BM	Initial
795	Close out any loans, grants or other provisions provided for other emergencies with the IRS.	BM	Initial
796	Close out any loans, grants or other provisions provided by FEMA for disaster relief.	BM	Initial
797	Cancel National Park Service membership.	BM	Initial
798	Find, secure, understand all documents and information on veteran or survivor status.	BN	Initial
799	Find Military service papers, including discharge records.	BN	Initial
800	Find the Veterans' benefit records & VA number (Veteran Affairs Identification Number).	BN	Initial
801	Search for additional information (e.g. military unit, groups, ships). Decide on informing.	BN	Initial
802	Determine if Veteran Cemetery desired by deceased or family. Request evaluation to qualify.	BN	Initial
803	Arrange for Veteran headstone, marker or medallion for their grave.	BN	Initial
804	Request Burial Plot Interment Allowance. The form is VA 21P-530.	BN	Initial
805	Request Military Honors at the burial, including a burial flag.	BN	Initial
806	Request Veteran's Insurance (examples are VGLI, FSGLI, VMLI, SGLI, S-DVI).	BN	Initial
807	Request Veteran's Administration (VA) Survivor Benefits. (e.g. Survivors Pension)	BN	Initial
808	Close out or transfer their PX (Post Exchange) account(s).	BN	Initial
809	Contact Casualty Assistance Office if they died on active duty.	BN	Initial
810	Investigate and obtain Wartime Service Pension (if applicable).	BN	Initial
811	Investigate and request Dependency & Indemnity Compensation.	BN	Initial
812	Contact Veteran Service Organizations (VSO) to check for benefits. (e.g. AMVETS, VFW)	BN	Initial
813	Notify DFAS (Defense Finance & Accounting Service) with respect to any benefits administered.	BN	Initial
814	Determine if they had a Survivor Benefit Plan (SBP).	BN	Initial
815	Determine if survivors can continue to receive healthcare (e.g. TRICARE).	BN	Initial
816	Investigate and apply for tax forgiveness, if available.	BN	Initial
817	Review Department of Veteran Affairs information to find any other benefits.	BN	Initial
818	Contact other military organizations for support (e.g. AER, AFAS, NMCRS)	BN	Initial
819	Find all documents on State or local government benefits or agencies to notify.	BO	Initial
820	Confirm State and local government agencies to notify and to resolve any benefits.	BO	Initial
821	Notify the State Department of Health. This may be part of the Death Certificate process.	BO	Initial
822	Notify the city/town government and Tax Office.	BO	Initial
823	Notify the county government, Commissioner and Tax Office.	BO	Initial
824	Investigate and collect any State burial benefits (varies by state).	BO	Initial
825	Investigate and collect any county burial benefits (varies by county).	BO	Initial
826	Notify State workforce agency. (i.e. unemployment)	BO	Initial
827	Notify State Welfare agency to cancel or transfer State assistance programs.	BO	Initial
828	Notify State and local agencies regarding any housing assistance programs.	BO	Initial

829	Notify State department of revenue or State revenue agency (e.g. Texas Comptroller's Office).	BO	Initial
830	Notify the State Office of Financial Recovery or equivalent State agency.	BO	Initial
831	Notify the State agency for both crime victim and worker's compensation, if applicable.	BO	Initial
832	Cancel voter registration(s) (at county level, with exceptions at city level).	BO	Initial
833	Find, pay then close or transfer water account. (if local government agency)	BO	Initial
834	Find and obtain (State, local) government benefits owed, government funds or property.	BO	Initial
835	Notify and State or local hunting license issuer.	BO	Initial
836	Transfer or sell any business or commercial licenses.	BO	Initial
837	Contact library to close account(s), ensure all books were returned.	BO	Initial
838	Find and close any transportation (e.g. buses/subway) passes.	BO	Initial
839	Find, secure, understand any documents related to disabilities or related benefits.	BP	Initial
840	Establish, as best as possible, type and timing of disabilities.	BP	Initial
841	Notify, stop and/or transfer any Federal disability payments. (SSDI and SSI).	BP	Initial
842	Notify, stop and/or transfer any State (supplementary to Federal) disability payments.	BP	Initial
843	Notify, stop and/or transfer any Veteran disability payments.	BP	Initial
844	Notify, stop and/or transfer any other (e.g. private, charity) disability payments.	BP	Initial
845	Identify and stop any Worker's Compensation payments (e.g. Indemnity, Impairment).	BP	Initial
846	Identify and stop any Worker's Compensation payments from any previous employer.	BP	Initial
847	Identify and secure any major disability related equipment, (e.g. scooters, respirators).	BP	Initial
848	Transfer, return or donate major disability related equipment. (e.g. scooters)	BP	Initial
849	Find, secure, understand all documents and information regarding any criminal issues.	BQ	Initial
850	Search for and obtain their criminal record(s). Focus search on specific geographies.	BQ	Initial
851	Determine if they were on parole or under in-house arrest. Notify parole officer or agency.	BQ	Initial
852	Recover any bail or resolve any bail bond agreements.	BQ	Initial
853	Notify any police departments with criminal warrants for their arrest.	BQ	Initial
854	Look into expunging their criminal record. May require a close relative to submit.	BQ	Initial
855	Find their computer(s), and any others they used but did not own.	BR	Initial
856	Look for additional accessories (e.g. hard drives, thumb drives, peripherals).	BR	Initial
857	Obtain any passwords to access computers.	BR	Initial
858	Find/gather any software manuals or other supporting information.	BR	Initial
859	Search for any software keys or other ownership proof/access (in electronic or printed form).	BR	Initial
860	Determine disposition (keep/transfer, donate, sell), and to whom if known.	BR	Initial
861	Check for any online storage accounts, e.g. Google Drive, for storage. Save & delete.	BR	Initial
862	Field requests from family and friends on files to search for and pass, or delete.	BR	Initial
863	Review computer for possible inclusions in digital legacy or support for ceremonies.	BR	Initial
864	Determine people to give files to and for which topics (finances, business, family history).	BR	Initial
865	Decide and delete files not needed by other parties (e.g. non-relevant PII, other).	BR	Initial
866	Save or transfer files for family or other recipients on to storage medium(s).	BR	Initial
867	Delete 'search history' from browsers and cookies from hard drives.	BR	Initial
868	For donate, sell and transfer, ensure the hard drive is completely erased.	BR	Initial
869	Deliver appropriate electronic files to identified family or friends. Record delivery.	BR	Initial
870	Find all mobile devices, identify models, payment information and related information.	BS	Initial
871	Obtain passwords to access mobile devices and key applications.	BS	Initial
872	Determine and execute device disposition (keep/transfer, donate, sell), and recipients.	BS	Initial
873	Check for any online storage accounts, e.g. Google Drive, for storage. Save & delete.	BS	Initial
874	Ask family and friends about types of files (e.g. pictures) to search for, preserve or delete.	BS	Initial
875	Search mobile devices for possible digital legacy materials or support for the services.	BS	Initial
876	Determine who to give files or transfer accounts to, and for which topics (e.g. finances).	BS	Initial
877	Identify and delete files not to be preserved (e.g. embarrassing, confidential).	BS	Initial
878	Prepare to transfer applications and data for beneficiary or new mobile owner.	BS	Initial
879	For donate and sell, and possibly transfer, ensure the mobile device is completely erased.	BS	Initial
880	Deliver electronic files to identified family members or friends. Record recipients.	BS	Initial
881	Review email clients and documentation to identify email accounts.	BT	Initial
882	Find all passwords for emails, or identify ones stored inside software.	BT	Initial
883	List all email accounts, both current and past, along with passwords.	BT	Initial
884	Notify address list(s) of the passing of the deceased.	BT	Initial
885	Download and save their email address lists.	BT	Initial
886	Create an auto-response to inform contacts of passing and account shutdowns.	BT	Initial
887	Save/download emails and attachments. Deliver to chosen surviving recipient.	BT	Initial
888	Set-up email forwarding to review incoming emails.	BT	Initial
889	Shut down all email address. Timing of shutdowns could differ.	BT	Initial
890	Identify and determine if anyone owed the Deceased money.	BU	Initial
891	Determine if the Deceased held or cosigned for any SBA loans and work to resolve.	BV	Initial
892	Determine if the Deceased was part of a carpool or ride sharing program.	BW	Initial
893	Determine if the Deceased held any physical precious metals or ownership certificates.	BX	Initial
894	Determine and identify any theft monitoring services that the Deceased may have had.	BY	Initial
895	Determine if the Deceased was a member of any board of directors for company or charity.	BZ	Initial
896	Review any email/group lists, discuss with friends or find any published work and their blogs.	CA	Initial
897	Advise and transfer any blogs or writing contributions. Identify and contact recipients.	CA	Initial
898	Notify any paying clients for writing. Recover money owed & provide any work-in-progress.	CA	Initial
899	Notify any groups they wrote for or contributed to, and provide any work-in-progress materials.	CA	Initial
900	Capture and transfer any mailing lists and hand-off responsibilities.	CA	Initial
901	Find and review all documents on any private companies or sophisticated financial assets.	CB	Initial
902	Find and transfer or liquidate any restricted stock.	CB	Initial
903	Find and transfer or liquidate any closely held stock or privately owned company stock.	CB	Initial
904	Find and transfer or liquidate any private equity investments.	CB	Initial
905	Find and transfer or liquidate any hedge fund investments.	CB	Initial
906	File or transfer any membership certificates (e.g. for Limited Liability Companies).	CB	Initial
907	Reconcile any collateral obligations or secured items against estate.	CB	Initial
908	Ensure that all transactions are properly recorded for both beneficiaries and taxes.	CB	Initial
909	Determine if they held any foreign assets, location and needed to transfer or liquidate.	CC	Initial
910	Determine if the Deceased was ever a teacher and if due any benefits.	CD	Initial
911	Identify and determine if the Deceased had any lottery winnings or respective annuities.	CE	Initial
912	Identify and determine if the Deceased was a member of a Native American tribe.	CF	Initial

913	Find, secure, understand all information regarding land or mineral rights.	CG	Initial
914	Determine if they had transferred ownership or leased any mineral rights.	CG	Initial
915	Identify any designations of transfer (e.g. in will), including beneficiary.	CG	Initial
916	Find and transfer/sell any Subsurface Gas Rights.	CG	Initial
917	Find and transfer/sell any Subsurface Gas Royalties.	CG	Initial
918	Find and transfer/sell any Subsurface Oil Rights.	CG	Initial
919	Find and transfer/sell any Subsurface Oil Royalties.	CG	Initial
920	Find and transfer/sell any Subsurface Mineral Rights.	CG	Initial
921	Find and transfer/sell any Subsurface Mineral Royalties.	CG	Initial
922	Transfer/sell any Land, Structures or Producing Assets.	CG	Initial
923	Determine if death was work related and any worker's compensation benefits eligibility.	CH	Initial
924	Review any name changes and decide which to put where, both desired and regulated.	CI	Initial
925	Confirm name to be on their death certificate.	CI	Initial
926	Establish or confirm wishes for current gender designation and name.	CI	Initial
927	Confirm decision to exclude prior name and/or gender in any public announcements.	CI	Initial
928	Confirm name(s) to be on plaques or headstones, and for grave databases & registries.	CI	Initial
929	Determine if they were in process of writing any books, plays or other literary efforts.	CJ	Initial
930	Identify and determine if the Deceased had multiple wills or a foreign will.	CK	Initial
931	Determine if Deceased had any inventions, other intellectual property that was not patented.	CL	Initial
932	Determine if the Deceased owned or cared for any livestock that was not part of a farm.	CM	Initial
933	Identify and determine if the Deceased had an Ethical Will.	CN	Initial
934	Determine if the Deceased or survivors have any potential eligibility for mining benefits.	CO	Initial
935	Identify and determine if the Deceased had an ideas list or creations that were in-process.	CP	Initial
936	Determine if Deceased wished for cryonics, head freezing or any other storage of body parts.	CQ	Initial
937	Determine if the Deceased wished for a burial at sea.	CR	Initial
938	Determine if the Deceased or survivors are eligible for railroad benefits.	CS	Initial
939	Identify and determine if the Deceased owned or leased a farm or had any crops.	CT	Initial
940	Determine if there was a conservatorship and obtain assets and accounting.	CU	Initial
941	Determine if they owned any timberlands.	CV	Initial

Question Letter	IDRS Question	Item(s)	Rev.
A	Did deceased pass in a city/country different than service/burial location?	1 to 8	Initial
B	Did they or survivors adhere to a religion or cultural customs regarding death?	9	Initial
C	Did they request to donate their body to science or to a body farm?	10	Initial
D	Did they have plans for any organ or tissue donations?	11 to 15	Initial
E	Was an autopsy requested by health officials, law enforcement or the family?	16	Initial
F	Were any grave plots, funeral preparations or other items completed or paid for?	17 to 21	Initial
G	Are they going to be cremated?	22 to 40	Initial
H	Are they to be buried in a grave (not cremated), or interred in a mausoleum?	41 to 51	Initial
I	Will there be any public notices, obituaries or postings published?	52 to 63	Initial
J	Is a service (e.g. funeral or memorial service) being planned?	64 to 84	Initial
K	Are you planning any pre-burial viewing (visitation/wake) or other event(s)?	85 to 97	Initial
L	Is a graveside or committal service planned?	98 to 108	Initial
M	Did the deceased use any aliases, nicknames or other names (e.g. maiden)?	109	Initial
N	Are there key documents to collect, categorize and understand? (assume Yes)	110 to 129	Initial
O	Was there a will and/or is probate possibly required? (assume Yes)	130 to 165	Initial
P	Do they have or care for any pets or animals?	166 to 193	Initial
Q	Does the deceased have survivors/heirs, family, beneficiaries or friends?	194 to 205	Initial
R	Were they ever married or in a relationship governed by similar laws or rules?	206 to 219	Initial
S	Did they have children or other dependents (e.g. step, adopted or foster)?	220 to 233	Initial
T	Did they have any disabled / special needs children or other dependents?	234 to 246	Initial
U	Did the location of their passing require any clean up that requiring scheduling?	247	Initial
V	Did they have an accountant / CPA or a lawyer they had used or consulted?	248 to 252	Initial
W	Did they have any open appointments, calendars or scheduling tools?	253	Initial
X	Are the debts of the estate possibly greater than the assets?	254	Initial
Y	Did they they rent (from others) where they lived or rent other real estate?	255 to 267	Initial
Z	Did they own any real estate or related investments?	268 to 292	Initial
AA	Did they have any keys, passwords, codes, or other security features?	293 to 300	Initial
AB	Did they have any live-in help or assistants?	301 to 310	Initial
AC	Were they employed at the time of passing?	311 to 333	Initial
AD	Are there any tax filings at any level (Federal, State, Local)? (assume Yes)	334 to 374	Initial
AE	Were there any Powers of Attorney or designations made?	375 to 378	Initial
AF	Is a full asset search required to find/identify all possible assets?	379	Initial
AG	Was their death related to a crime?	380 to 385	Initial
AH	Were they, spouses or kids ever a non-U.S. citizen or hold/apply for a U.S. Visa?	386 to 393	Initial
AI	Are they involved in any current legal issues? Any future concerns?	394 to 407	Initial
AJ	Any household goods or valuables requiring sale, distribution or donation?	408 to 440	Initial
AK	Did they have any home services at their residences or rentals?	441 to 463	Initial
AL	Did they own any firearms or other weapons (also inerts, replicas)?	464 to 472	Initial
AM	Did the deceased have any internet accounts, groups or memberships?	473 to 496	Initial
AN	Any medical provider, pharmaceutical or healthcare plans or bills?	497 to 508	Initial
AO	Did they have any professional/personal service providers to notify?	509	Initial
AP	Were they involved or contribute to any charities, causes or non-for-profits?	510 to 520	Initial
AQ	Did they attend any colleges, universities or private schools?	521	Initial

AR	Were they attending any schools or had they recently paid any tuitions?	522	Initial
AS	Did they have any frequent flyer or travel program memberships?	523	Initial
AT	Were they a member or participant in any clubs, groups or societies?	524 to 530	Initial
AU	Do you want to sign up to the Do Not Call or mail lists for the deceased?	531	Initial
AV	Did they have any bank accounts?	532 to 547	Initial
AW	Did they have any loans, credit lines, creditors or other debts?	548 to 572	Initial
AX	Are there financial assets or accounts? (stocks, bonds, mutual funds)	573 to 590	Initial
AY	Did they have retirement accounts or funds (e.g. pensions, 401k, IRAs)?	591 to 602	Initial
AZ	Did they have any insurance policies or were there any related to them?	603 to 626	Initial
BA	Did they own any vehicles (e.g. cars, boats, planes), including fractional?	627 to 648	Initial
BB	Are there any trusts with respect to the Deceased or their family?	649 to 680	Initial
BC	Were they eligible for any Federal government retirement benefits?	681	Initial
BD	Are there cryptocurrency or decentralized financial accounts or assets?	682 to 688	Initial
BE	Did they operate or own a stake in any businesses or private companies?	689 to 716	Initial
BF	Do any of the owned businesses qualify as a family business?	717 to 724	Initial
BG	Did they belong to a union, or work in a professional or licensed trade area?	725 to 729	Initial
BH	Were they self-employed? Or do contract work, 'gigs' or temporary service work?	730 to 738	Initial
BI	Did they have any prior employers, before their final one?	739 to 748	Initial
BJ	Any intellectual property (e.g. patents, TMs, songs) owned or filed?	749 to 765	Initial
BK	Did they have any accounts on crowdfunding sites?	766	Initial
BL	Is there any open legal issue (non-litigation) to be considered or resolved?	767 to 774	Initial
BM	Are there any Federal government agencies to notify or any benefits?	775 to 797	Initial
BN	Were they, a spouse, child or parent eligible for any veteran related benefits?	798 to 818	Initial
BO	Any State or local government agencies to notify or any benefits?	819 to 838	Initial
BP	Were they ever disabled, or receiving any disability related benefits?	839 to 848	Initial
BQ	Did they have a criminal record or involved in the penal/probation system?	849 to 854	Initial
BR	Did they own a computer, or use any others and store information/files?	855 to 869	Initial
BS	Own/use a mobile device (e.g. Android, iPhone) or tablet (e.g. iPad)?	870 to 880	Initial
BT	Did the deceased have any email accounts?	881 to 889	Initial
BU	Was the deceased owed money from anyone, and can you confirm this?	890	Initial
BV	Did they have or co-sign for an SBA Loan?	891	Initial
BW	Were they part of any car pools or ridesharing?	892	Initial
BX	Did they own any physical precious metals or ownership certificates?	893	Initial
BY	Did they have any identify theft monitoring services?	894	Initial
BZ	Were they on any boards of directors?	895	Initial
CA	Were they doing writing, publishing, newsletters or managing mailing lists?	896 to 900	Initial
CB	Were they an accredited investor (e.g. SEC - private, restricted stock)?	901 to 908	Initial
CC	Did they own any foreign assets (e.g. real estate or investments outside U.S.)	909	Initial
CD	Where they a teacher at anytime in their career?	910	Initial
CE	Did they have any lottery winnings or annuity distributions?	911	Initial
CF	Were they a member of a Native American tribe?	912	Initial
CG	Did they have any land, mineral rights, oil or related assets?	913 to 922	Initial
CH	Was their death work related, and will it involve workers compensation?	923	Initial
CI	Were they transgender or have a different gender identification?	924 to 928	Initial
CJ	Were they in the process of writing any books, plays or other major efforts?	929	Initial
CK	Did they have multiple wills or a foreign will?	930	Initial
CL	Did deceased have any unpatented inventions (software, tools, etc.)?	931	Initial
CM	Did they own or care for any livestock not part of a farm?	932	Initial
CN	Did they have an 'Ethical Will' (Legacy Letters)?	933	Initial
CO	Did they work for a mining company, in a mine or qualify for miner benefits?	934	Initial
CP	Did the deceased have an 'Ideas List' or any creations that were in-process?	935	Initial
CQ	Did they ask for any cryonics? Head freezing? Other?	936	Initial
CR	Was a burial at sea requested for the body?	937	Initial
CS	Were they or a spouse ever employed with a railroad?	938	Initial
CT	Did they own or lease a farm and/or have any crops?	939	Initial
CU	Was there a conservatorship for the deceased?	940	Initial
CV	Did they own any forest or timberlands?	941	Initial

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