

Suddenly Single Checklist Timeline

Immediate Needs

- ☐ Who needs to be notified?
- ☐ What documents need to be produced?
- ☐ Funeral?
- ☐ Insurance review
- ☐ 6 months living expenses

First Month

- ☐ Human Resources if still working
- ☐ Personal Effects
- ☐ Track spending
- ☐ Create a working budget
- ☐ Notify:
 - Social Security Administration
 - Pension administrators
 - Life and Health Insurance Companies
 - Bank and Investment Companies
 - Credit Card Companies
 - Utilities
- ☐ Watch mail/email for unknown accounts

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First Six Months

- ☐ Update financial plan
- ☐ Determine income needs
- ☐ Estate-tax return
- ☐ New Will
- ☐ Review living will
- ☐ Educational funding changes
- ☐ Guardians for minor children specified
- ☐ Credit card points, frequent flyer miles, hotel programs, scholarships, warranties

First Year

- ☐ Estate Tax
- ☐ Charitable gift in the deceased's name
- ☐ Review Financial Plan
- ☐ Determine the best date for valuing the estate for tax purposes