



CHECKLIST – AFTER A LOVED ONE PASSES AWAY

Losing a loved one is emotionally overwhelming. Here's a practical guide to help you navigate the process — and why having an experienced attorney can make all the difference to protect you from legal ramifications of mishandling the assets of someone who has died.

Immediately (Within the First Week)

- Notify close family and friends
- Arrange for care of dependents or pets
- Locate and secure the Will, Trust, or estate plan
- Order at least **10 certified death certificates** through the funeral home or local registrar
- Contact a funeral home or crematory to make arrangements

Tip: If you're unsure whether a Will exists or where it's located, an attorney can help you search public records or guide you through intestate (no-will) procedures.

In the Next Few Weeks

- Schedule a consultation with an **estate attorney** (such as Ivey & Eggleston) to understand your next legal steps
- Avoid distributing or touching assets (including bank accounts, personal property, vehicles, etc.) **until you receive legal guidance**
- Notify Social Security and pension providers
- Cancel the decedent's subscriptions and credit cards
- Begin gathering key documents:
 - Will or trust documents
 - Life insurance policies
 - Deeds and titles
 - Bank/investment account statements
 - Marriage and birth certificates
 - Prior tax returns



Within the First Few Months

- File life insurance claims
- Start estate or trust administration under your attorney's guidance
- The estate administration process will include:
 - Filing the Will with the County Clerk of Court
 - Preparing and filing an **inventory of the assets of the estate** (90 days after the estate is opened)
 - Notifying creditors including the NC Medicaid Estate Recovery Program, if applicable
 - Payment of debts of the Estate according to NC Statute, and
 - Distribution of inheritance to heirs

As the Estate Progresses

- Work with your attorney to:
 - File necessary tax returns (final income tax return, estate tax return if required)
 - Retitle assets according to the estate plan
 - Distribute assets correctly and legally
 - File an estate accounting with the Clerk of Court

Why Hire an Attorney?

Even "simple" estates can become complicated. An estate attorney:

- Guides you through the probate or trust administration process
- Helps minimize family conflict and delays
- Ensures compliance with deadlines and fiduciary duties
- Protects you from costly mistakes



Important: Mishandling assets, even accidentally, can lead to legal complications. An attorney ensures compliance with court requirements, creditor rules, and tax filings — protecting you from personal liability.

If you've lost a loved one and aren't sure what to do next, we're here to help you carry the legal burden — so you can focus on healing.

Ivey & Eggleston. Attorneys
Estate Planning, Probate and Asset Protection Planning
111 Worth St.
Asheboro. NC 27203
336-625-3043
Email: info@iveyeggleston.com