TOOL 10

First 72 Hours After a Death

This is a practical orientation, not a legal checklist.

- ☐ Take care of immediate family needs first.
- ☐ Locate the will, trust, and health / burial instructions.
- ☐ Identify the attorney and successor trustee / named executor.
- ☐ Secure the home, vehicles, valuables, pets, and mail.
- ☐ Confirm who is authorized before moving money or signing documents.
- ☐ Do not cancel property insurance simply because the owner died.
- ☐ Keep utilities needed to protect the property.
- ☐ Notify the appropriate professionals and ask what must happen before anything is distributed.
- ☐ Begin a simple list of assets, debts, recurring bills, and urgent deadlines.
- ☐ Avoid major cleanout, gifting, selling, or disposal decisions until authority is clear.

IMMEDIATE PROPERTY CONCERNS:

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