

## **List of items for The Red Box:**

- 1. Music/Picture/Instructions for Memorial Service**
- 2. Payment on death form from my bank to access funds**
- 3. Final Wishes booklet with all info on financial accounts/passwords/automobile registration/property owned/safety deposit box**
- 4. Specifics on my niche and copies of payment**
- 5. Certified copies of Birth and marriage certificates/Social security card**
- 6. Copies of Medicare card, supplement and RX card**
- 7. Copies of credit cards & drivers license**
- 8. Cremation policy**
- 9. Prenuptial if appropriate**
- 10. Obituary**
- 11. DD-214...Veteran information**
- 12. Will/Durable Power of Attorney and Living Will/Healthcare Directive-Surrogate**
- 13. Death Checklist-what to do and who to contact upon the death of a loved one**
- 14. List of passwords used for accounts/computer**
- 15. Some type of reflections journal to share your story with your family.**

**CHECKLIST  
THINGS TO DO WHEN A PERSON DIES**

<b>Place an " X " in the left column when item has been completed</b>	
<input type="checkbox"/>	Notify immediate family and close friends
<input type="checkbox"/>	Evaluate the emotional impact on the surviving spouse, children and close relatives and friends; arrange for support
<input type="checkbox"/>	Deal with donation of bodily organs to an "organ bank," as appropriate
<input type="checkbox"/>	Arrange care for dependents, if any
<input type="checkbox"/>	Notify attending physician or coroner
<input type="checkbox"/>	Arrange care for pets, if any
<input type="checkbox"/>	Evaluate the need for security at Decedent's residence
<input type="checkbox"/>	Cancel or rearrange home deliveries?
<input type="checkbox"/>	Have Post Office hold mail?
<input type="checkbox"/>	Find perishable property (food, plants, etc.), arrange for care or disposal
<input type="checkbox"/>	Find and review Decedent's expressed funeral and burial wishes
<input type="checkbox"/>	Notify agent under any power of attorney
<input type="checkbox"/>	Prepare and arrange for obituary
<input type="checkbox"/>	Arrange for mortuary, cemetery, burial, cremation, as appropriate
<input type="checkbox"/>	Arrange funeral/burial services
<input type="checkbox"/>	Notify other members of family and friends
<input type="checkbox"/>	Keep records of all payments for funeral and other expenses
<input type="checkbox"/>	Locate safe deposit box(es); follow safe deposit box procedures (see page 2)
<input type="checkbox"/>	Locate wills, codicils, trusts
<input type="checkbox"/>	Locate life insurance policies
<input type="checkbox"/>	Locate other important documents, relationships, accounts, investments, etc.
<input type="checkbox"/>	Advise Social Security, Medi-Cal, other agencies as appropriate
<input type="checkbox"/>	Investigate social security benefits
<input type="checkbox"/>	Investigate life insurance
<input type="checkbox"/>	Investigate union death benefits
<input type="checkbox"/>	Investigate veterans burial allowance and other benefits
<input type="checkbox"/>	Investigate fraternal organizations

Place an " X " in the left column when item has been completed	
	Investigate employee benefits, including accrued vacation pay, death benefits, final wages, retirement plans, deferred compensation, medical reimbursements,
	Investigate refunds on insurance or canceled subscriptions
	Investigate Keogh and IRA accounts
	Investigate business, partnership and investment arrangements
	Retain and meet with attorney regarding estate matters
	Retain and meet with CPA as to tax and accounting matters
	Meet with life insurance agent to collect proceeds or consider options
	Obtain death certificates (ask attorney how many are needed)
	Deal with fire, theft, liability and auto insurance on Decedent's property
	Work with attorney and CPA to prepare inventory, list of accounts and list of debts
	Review credit cards and charge accounts, cancel as appropriate
	DO NOT pay any of Decedent's debts until attorney discusses with family or executor
	Obtain valuations of assets, as appropriate
	If Trust involved, arrange for any allocations and transfers
	Arrange for final income tax return and estate tax return, as necessary

#### Safe Deposit Box Access Procedures

*Suggestion: If there is any danger of a will or trust contest, or a conflict between executor, trustee, family or beneficiaries, DO NOT go to safe deposit box without the involvement of an attorney experienced with estate administration.*

**Owner(s) Deceased:** California Probate Code § 331 authorizes a person who has the key to a safe deposit box of a deceased person to have access to the box, even before any action has been taken with the probate court. The financial institution shall first obtain proof of the decedent's death and reasonable proof of the identity of the person seeking access. The person may then:

1. open the box (under the supervision of an officer or employee of the financial institution),
2. make an inventory of the contents,
3. remove instructions for disposition of the decedent's remains, and
4. after copies have been made and placed in the box, remove wills and trust instruments.

Except for the disposition instructions, wills and trust instruments, no other contents shall be removed under these provisions. The person shall deliver all wills found in the box to the clerk of the superior court, and mail or deliver a copy to the person named as executor.

**Surviving Co-Owner(s):** Surviving Co-Owners have the right to access, as provided in their agreements with the financial institution. When accessing a safe deposit box after the death of a co-owner:

1. At least two people should be present at the first opening, and should make an inventory of the contents in detail on letter size paper, with both persons signing and dating the paper.
2. After copies have been made and placed in the box, remove documents as needed.

2022

NORTHWEST FLORIDA

2023

# Senior RESOURCE GUIDE

*Helping Seniors Find Community Services*



• **Community Resources & Services**

• **Directories**

• **Feature Articles**



**AssistedLiving**  
LOCATORS

**Sharon Oakes**  
Care Specialist

Phone: 850.542.3088 Cell: 850.449.0498

3860 Leesway Circle  
Pensacola, FL 32504

ssokes49@hotmail.com  
AssistedLivingLocators.com

- **Home Care Provider Comparison Grids**
- **Senior Housing Comparison Grids**



**FREE**

*Serving Escambia, Santa Rosa, Okaloosa & Walton Counties, Florida & Escambia County, Alabama*