



personal law



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What to Do Immediately After Someone Dies



Probate of an estate is complex. At Crest Key, we compassionately help survivors wind down the affairs of a loved one and manage the demands from creditors, IRS, and family members.

What Should I Do First?

There are several things a nominated personal representative should do immediately after someone dies. We've created a checklist featuring the most typical "first steps," but the list is not all-inclusive. Always consult an attorney before taking action.

- Secure all valuables and cash. Be sure to note a) what you found and b) where each was located. Get your smart phone or digital camera out and take photos of all objects found. This will be important if accusations of impropriety arise. Just know, if you enter a residence by yourself, a disgruntled family member may accuse you of stealing. Take, if possible, a neutral third party.
- Ensure all pets are properly fed, watered and cared for.
- Secure the residence. Remove perishable items; stop newspaper delivery; turn lights on; care for plants; pull back trashcans; maintain lawns and pools, if applicable. Your goal is to create the impression the residence is still occupied.
- Secure all firearms. If you are a felon, make sure you do not violate any laws by just touching a firearm. If the deceased has contraband (e.g., illegal drugs), do not move it! Call the Bureau of Alcohol, Tobacco, Firearms and Explosives (ATF) to make a pickup — and be sure to get a receipt. Don't accidentally commit a felony while trying to be a good person.
- If the deceased left a house, secure it. Consider possibly changing the locks to protect the contents of the residence from others (such as a housekeeper or a next door neighbor) who may have a key.
- Motor vehicles should be moved into the garage, or otherwise made secure. If the motor vehicle has to be moved to a location other than a garage attached to the residence of the deceased, to secure it, keep it in the same town as the deceased lived.


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- Check arriving mail. Be sure to pay the utilities, telephone and mortgage. This will protect the property. The court will order that you are to be reimbursed. **DO NOT CALL UTILITY COMPANIES TO ADVISE OF THE DEATH — THIS WILL UNNECESSARILY COMPLICATE THINGS.**
- Look for the deceased's estate-planning documents in the residence. Specifically look for a document that says something such as "Will," "Last Will and Testament," "Trust," or "Revocable Living Trust." Look for the safe deposit box key, too.
- Start looking for financial documents such as bank statements, brokerage statements, life insurance, etc. This may prove challenging to purely difficult, since statements are often delivered electronically.
- Keep notes and receipts on all that you do. Take photos.
- Address family priorities regarding burial arrangements, a viewing or wake, and other family matters.
- Family members will likely be emotional during this time. They will have demands and expectations of you – and may even shout. Keep in mind that confrontation or yelling back will not help the situation. Ask family members to write down their thoughts for you. This way, they will feel heard and not overlooked or forgotten.

Crest Key is a progressive estate planning law and accounting firm comprised of attorneys and accountants specializing in personal, business and international matters. Our estate planning goes beyond traditional techniques and our probate and trust litigation experience helps protect your interests now and in the future.

Do You Need Help Probating an Estate?
Contact Crest Key to learn more about our Probate and Trust Administration Services or visit us online at www.crestkey.com.


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This checklist has been prepared solely for informational purposes and should not be taken as legal, tax, or accounting advice. Probate of an estate is unique for each person and challenges may exist that are not addressed above. Before making decisions, you should always seek the advice of a professional experienced in probate and trust administration.

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