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EXECUTORS & SURVIVORS

# What To Do When Someone Dies

A simple, practical guide for executors and surviving family — the first steps, in a sensible order.

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**InheritGuard Partners**

Coordination. Collaboration. Continuity.

[inheritguardpartners.com](https://inheritguardpartners.com)

### IN THE FIRST DAYS

- Obtain a legal pronouncement of death
- Notify close family and key contacts
- Secure the home, property, and pets
- Locate the will, trust, and final wishes

### IN THE FIRST WEEKS

- Order multiple certified copies of the death certificate
- Contact the estate attorney
- Notify Social Security and relevant agencies
- Locate and notify financial institutions
- Identify life insurance policies and file claims

### SETTLING THE ESTATE

- Open the estate / begin probate if required
- Inventory assets, accounts, and debts
- Notify creditors and address outstanding bills
- Coordinate with the CPA on final tax filings
- Distribute assets according to the plan

### CARING FOR YOURSELF

- Lean on professionals — you don't have to do this alone
- Keep organized records of every action taken
- Give yourself time and grace

#### Next Step — Schedule a Private Review

If you're facing this now, coordinated guidance can lighten the load. Visit [ericrodriguez.co/private-review](https://ericrodriguez.co/private-review).

*This checklist is provided for general educational purposes only and does not constitute legal, tax, or financial advice. InheritGuard Partners does not provide legal or tax advice. Consult qualified professionals about your specific situation.*