LIFE BEYOND TODAY

PREPARING YOUR LOVED ONES FOR TRANSITIONING OR AFTER DEATH

Cancer Bucket List

- Things to do when you've been diagnosed with Cancer
- Places to visit
- People to visit
- Appearance changes
- Activities to do after diagnosis
- A cure or a donor for a specific illness

Cancer Patient List- https://www.verywellhealth.com/dealing-with-terminal-illness-1132513

- Empower yourself through knowledge
- Forgive Yourself in advance
- Set Priorities
- Plan for a Good death
- Talk openly About it
- Establish a Practical support Network
- Process the paperwork
- Prepare for Funeral
- Say wat needs to be said
- Make the Final moments count and Special

In case of death: Checklist of your deceased loved ones

- Obtain legal documentation of death
- Notify necessary parties
- Make arrangements for the body
- Make arrangements for children and pets
- Secure assets & carry out other related task
- Carry out decedent wishes
- Settle the estate

Companies to contact

- **Social Security**- Reporting someone's death to the Social Security Administration is very straightforward. You can speak to a representative by calling 1-800-772-1213 (TTY 1-800-325-0778
- **Bank/Mortgage companies** - Though this one may require some digging to find out who you should contact, it's important to let mortgage companies and banks know of the death. If

you're not sure which bank to contact or who holds the mortgage, looking in a safety deposit box, a safe, a home office, a file cabinet or a desk is a good place to start.

- **Financial advisors/brokers -** Just like finding the contact information for a bank or mortgage company, financial planners, personal bankers and brokers may be a bit hard to track down. You might be able to determine them simply by going through files, mail and wallets. You should contact any financial institutions you find as soon as possible.
- **Insurance companies**- You want to reach out to any companies that insured the decedent. There may be death benefits due to the estate.
- **As Executor, reach out to beneficiaries, trustees etc** -Keep all interested parties informed and up to date with what's going on, especially if there are any delays. Keep detailed and accurate financial records as you move through the steps to settle the estate.
- **Determine the need for probate- If there is no Estate** Plan at all, or if there is just a Will (but no Trust), the estate will go through probate. Probate is simply the process of a court validating a Will and then distributing assets. If there is a Trust, probate can be skipped entirely
- **Pay bills/close accounts** - You will likely need to set up a bank account in the estate's name to handle any financial dealings throughout these final stages. Be sure to have an accurate inventory of all assets, accounts and anything else you'll need to take care of to close the estate
- **Distribute assets** – The main purpose of Estate Planning is to distribute assets, so once you're at this stage, and all the debts and any taxes the estate owes have been settled, you'll finally be able to make sure all remaining assets go to the appropriate beneficiaries as dictated by the Will or Trust.