2026 · LOSS OF A LOVED ONE

MILLENNIAL WEALTH

Losing a loved one is incredibly difficult. While many decisions can wait, there are a few important steps that may need attention in the days following their passing.

TAKE TIME FOR YOURSELF AND YOUR FAMILY

- ☐ **Lean on family, friends, and your support network** during this difficult time.
- ☐ **Remember that many financial and legal matters** can be addressed later.

TAKE CARE OF IMMEDIATE ARRANGEMENTS

- ☐ **Contact a funeral home** or memorial service provider to begin making arrangements.
- ☐ **Locate any funeral or burial instructions,** if your loved one documented their wishes in advance.

OBTAIN OFFICIAL DOCUMENTATION

- ❗ ☐ **Request 10+ certified copies of the death certificate,** which will be needed when notifying financial institutions and transferring accounts.
- ☐ **Locate important identifying information,** such as Social Security number, date of birth, and place of birth.

SECURE PROPERTY AND IMPORTANT ITEMS

- ❗ ☐ **Ensure the home, vehicles, and other property are secure,** including any safes or storage units.
- ☐ **Locate important documents,** such as wills, trusts, insurance policies, and financial account information.

NOTIFY KEY ORGANIZATIONS

- ❗ ☐ **Confirm that the Social Security Administration has been notified** and ask about any remaining benefit payments.
- ☐ **Inform your loved one's employer,** if they were still working.
- ☐ **Contact life insurance companies to begin the claims process,** if applicable.

COORDINATE WITH TRUSTED ADVISORS

- ☐ **Locate contact information for and notify your loved one's financial advisor, attorney, and tax professional,** if applicable.
- ☐ **Identify the executor or personal representative** responsible for managing the estate.

KEEP RECORDS

- ☐ **Document important conversations and steps taken,** including institutions contacted and next steps.

❗ This to-do item may be higher priority or more time-sensitive than others.

LOOKING FOR A FIDUCIARY, FEE-ONLY FINANCIAL ADVISOR?

MILLENNIAL WEALTH

About Us:

Millennial Wealth is a fee-only financial planning firm specializing in services for young professionals and families in the tech industry. We're located in Seattle, WA but service clients all across the United States. Our services include but are not limited to; cash flow and budgeting advice, goals-based planning, retirement planning, insurance advice, college planning, estate planning, tax preparation, and filing, tax planning, investment management, employee benefits optimization, equity compensation planning, and debt management.

Visit our website for more information or to schedule a free consultation!

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