



The Rutherford Law Firm, PLLC

WILLS · TRUSTS · PROBATE · ESTATE ADMINISTRATION

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AFTER A DEATH · FAMILY CHECKLIST

When a Loved One Dies: The First Two Weeks

The days after a death are heavy, and most legal steps can wait longer than families expect. There is rarely a need to rush a court filing; there is real value in getting the first decisions right. This checklist covers the practical first steps.¹

◆ Right away

- | | |
|--|---|
| <input type="checkbox"/> Obtain the legal pronouncement and arrange care of the body | <input type="checkbox"/> Secure the home, pets, vehicles, and valuables |
| <input type="checkbox"/> Notify close family and a few trusted friends | <input type="checkbox"/> Locate the will, trust, and important papers |
| | <input type="checkbox"/> Do not transfer or distribute property yet |

◆ Within the first two weeks

- | | |
|---|---|
| <input type="checkbox"/> Order 6 to 10 certified copies of the death certificate | <input type="checkbox"/> Notify employers, banks, and insurers |
| <input type="checkbox"/> Arrange the funeral or memorial per any written wishes | <input type="checkbox"/> Forward mail and keep a list of accounts and bills |
| <input type="checkbox"/> Notify Social Security and any pension or benefits providers | <input type="checkbox"/> Gather documents and consult an attorney about whether probate is needed |

◆ Key information

Funeral home / contact

Location of the original will

Named executor

REFERENCES & SOURCES

1. Social Security Administration, "What To Do When Someone Dies." www.ssa.gov
2. Tex. Est. Code § 256.003 (a will generally must be admitted to probate within four years of death). statutes.capitol.texas.gov
3. Tex. Est. Code §§ 401.001–401.003 (independent administration). statutes.capitol.texas.gov
4. Texas Law Help, "Wills, Estate Planning and Probate." texaslawhelp.org
5. Bexar County Probate Courts. www.bexar.org

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