

Let's See If We Can Help, Inc.

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A few helpful pointers to reference when someone dies

Death is a hard pill for most of us to swallow, but each of us will one day have to do it. The key to a smooth transition and easing the burden on your loved ones is preparation. The death of a person can be a very stressful time and often makes it difficult for family and friends to think clearly and concentrate on some of the estate issues that have to be attended to. Whenever possible, it is best to obtain as much information as possible from the soon-to-be decedent about their final wishes, any assets, liabilities and/or other business-related matters that will need to be attended to after their death. Always attempt to know the person's final arrangement wishes. Though I have not attempted to place the following points in a logical sequence, nor is it complete, some will be highlighted with a (*) to note their level of priority and all should be helpful. Remember that there are people out there that prey on the deceased and their families to make claim to unentitled assets. Avoid hasty decisions and distributions, as this process can take anywhere from six months to years to complete.

- Find out if the person had a medical or advance directive*
- Notify close family members and friends and if known, their pastor, attorney and /or accountant
- Get legal pronouncement of death and arrange to receive multiple copies of death certificate as soon as possible*
- Arrange transportation of the body to proper authorities or party*
- Secure the persons home directly or through friends and family. Notify police if home will be vacant.
- Notify social security office, banks, insurance companies, benefits departments, income sources, utility companies*
- If employed, contact person's place of employment. Ask about employee benefits
- Make funeral or cremation arrangements if requested
- If person belonged to military, church or other known organizations contact them for notification
- Check to see if person has life insurance policies, bank accounts, a will, a trust, titles (i.e., car or house) *
- Check to see if person left important papers behind relevant to death such as a will, trust documents or insurance policies*
- Contact the local Office of Probate for more directives
- If necessary, authorized person should open estate bank account
- Try to locate such things as taxes, deeds, bank and investment records, insurance policy, death, birth and marriage certificates, possible estranged spouse and children, trust docs, debts, income sources, safe deposit boxes, computer and phone passwords

Some of the Philadelphia area city and state offices you may want to contact:

Prothonotary Office

City Hall Room 262
215-686-6665

Department of Deeds and Records

City Hall Room 154
215-686-2292

Inheritance Tax

City Hall Room 177
215-686-2918

Register of Wills

City Hall Room 180
215-686-6255

Department of Revenue

MSB 15th JFK Blvd., Ground Floor
215-686-9200

PA Vital Records Dept.

110 N. 8th St., Philadelphia
215-560-2056