

Under California Probate Code 13100 et. Seq., no person shall act on behalf of the estate for 40 days following the death of the deceased.

After the death of an individual no legal action can be taken in regard to the Descendant's Estate. However, we recommend that you take the following actions before the 40 day period:

Pre-Death:

- Critical Care Event
- Is your loved one an Organ Donor?
- If so, body is handled by the Hospital.
 - o Upon conclusion of Organ Donation, body is transferred to the Hospital Morgue.
- After death, call the mortuary to arrange transportation.

Date of Death:

Post Death Handling of Remains:

- If loved one dies of natural causes- call your local mortuary.
- If cause of death is unclear call 911.
- Once cause of death is determined:
 1. DPAHC to arrange transportation to mortuary or

After body is released to Mortuary:

- Make arrangements consistent of Estate Planning documents.
 - Burial, Cremation, Services, etc.
- Order 10 Death Certificates.
- Make Financial Arrangements with Funeral Home.
 - Trust Pays
 - Family Pays
 - Pre-paid Funeral
- Keep Records of Funeral payments.

Death Notifications:*

- Notify Family. Clear dates for Funeral.
- Notify Employer, Pension Provider, Social Security and Veterans Administration.

*Note: Limit notifications to those listed above. Further notification may be required 40 days following the death of the decedent.

Securing Dependents, Pets Assets & Paperwork:

- Attend to the needs of the decedent's dependents and pets.
- Change all exterior door locks.
- Collect all keys/change security codes of home.

- Photograph home contents.
- Take possession of all paperwork. Box and store paperwork securely off-site.
- Take possession of Vehicle keys. Gather & confirm vehicle registration & insurance.
- Secure loose valuables. Remove all: Jewelry, Cash, Coins, Guns & Collectables to a safe location off-site.

Occupy Empty House:

- Arrange for caretaker to occupy house if vacant.
 - Caretaker is to be instructed that no one is to remove anything from home without Trustees or Executor's approval.

Funeral Arrangements:

- Contact your local Funeral Home so they can assist you in this process.
 - Embalmed or Cremated?
 - What type of funeral service will you be having?
 - Funeral- Service before burial/cremation
 - Memorial- Service after burial/cremation
 - Graveside- Service is at a graveyard

- o Prepaid, Family Paid or Trust Paid
- o Funeral Scheduling: when, where, how many people, how much?

- Obituary
 - o Specific group affiliation (Military, Religious)
 - o Submit Obituary of loved one to local newspaper/online

Date of Funeral:

- Flowers/Wake
 - o Arrange flowers and food for after the service
- Payment
 - o Trust
 - o Family

Post Funeral:

- Gather documents for Funeral Expenses
 - o Direct
 - o Reimbursed
 - o Pre-Paid/Pre-need
- Gather all other post death documents

- Contact attorney to complete the Administration of the individual Estate or Trust Estate.
 - Bring documents to appointment.