What to do when someone dies: the first thirty days

This is a plain checklist for families in California. It isn't legal advice for your situation, and every case is different. Print it, work down it, and call John if anything on it raises a question.

The first week

- ☐ Get several certified copies of the death certificate. Banks, insurers and the county recorder will each want one.
- ☐ Secure the house: lock it, collect the mail, keep the insurance in force, and don't let anyone remove belongings yet.
- ☐ Find the papers. Look for a will, a living trust and any amendments, deeds, recent bank and brokerage statements, life insurance and retirement account statements.
- ☐ Find out who the parent named. The will names an executor; the trust names a successor trustee.
- ☐ Don't sign anything you don't understand, including a "just sign here so we can get started" from a sibling or their lawyer.

The first month

- ☐ **DEADLINE** If there's an original will, California law requires whoever has it to deliver it to the Superior Court within 30 days of learning of the death.
- ☐ Ask the successor trustee, in writing, for a copy of the trust and every amendment.
- ☐ **DEADLINE** Watch your mail for a trustee's notice. Write down the date it arrives. It can start a short deadline to contest the trust.
- ☐ Keep a list of every conversation about the estate: who said what, and when.
- ☐ Save texts, emails and voicemails from your parent's last years, especially anything about their wishes.
- ☐ Don't move money in or out of your parent's accounts, even to pay a bill, without understanding whose authority you're using.

Call a probate lawyer now if…

- ☐ The will or trust is different from what your parent told you.
- ☐ A trust or will was changed in the last year or two of life.
- ☐ Someone close to your parent ended up with much more than expected.
- ☐ The trustee or executor won't share documents or numbers.
- ☐ The house is being listed or sold without your knowledge.
- ☐ You've received a trustee's notice, or a notice of a probate hearing.

Call John at 310-351-5434, or tell him what happened at myinheritance.com/contact

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Attorney advertising. This checklist is general information, not legal advice for your situation. Every case is different. Contacting the office does not create an attorney-client relationship.