

*The experience you require. The compassion you'll appreciate.*

## What Do I Need After the Funeral?



**STROHSCHNEIN  
LAW GROUP<sup>LLC</sup>**

*Protecting What Matters*

No matter when it happens, the loss of a loved one is a moment we are often unprepared to address. You may have made many decisions related to the funeral but you may not know what next steps may be necessary to finalize your loved one's wishes.

Below is a list of next steps and documents to consider related to honoring your loved one's legacy.

### **Possible Next Steps:**

- File the Will
- Collect Assets
- Pay Outstanding Debts
- File Tax Returns
- Prepare Final Account
- Issue Distributions



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### **What to Collect:**

- Original Will, Codicils and/or Trust
- List of to Whom Personal Items are Designated
- Certified Death Certificate
- Beneficiary Information (Name, Address, SSN)
- List of all Prior Spouses and/or Children
- Inventory of Valuables
- Banking and Safe Deposit Box Information
- Original Certificates for Investments
- Automobile Titles
- Real Estate Deeds and Tax Documents
- Life Insurance Information
- Income Tax (Last 3 Years) and Gift Tax Returns (All)
- Business Documents
- Current Bills and Loan Information
- Unpaid Wages or Employer Death Benefits
- Accountant Information
- Potential Lawsuit or Claim Information

*At Strohschein Law Group, we understand the complexities of Estate and Trust Administration and we are ready to help you walk through them. We are committed to providing knowledgeable, caring and personal counsel at this difficult time for you. When you have questions, give us a call at (630)-377-3241.*

*Linda Strohschein, Attorney*