Mesirow Wealth Management

Mesirow

Legacy checklist

WEEKS 1 AND 2

- ☐ Attend to pets
- ☐ Call family and close friends
- ☐ Funeral arrangements – Contact local media for obituary
  - ☐ Get a legal pronouncement of death (Death Certificate) from the funeral home
- ☐ Contact social security administration
- ☐ Call estate attorney, set up appointment
- ☐ Determine who executor is (this will be in the will)
- ☐ Call nursing home administrator if in a home and deceased passed elsewhere
- ☐ If they are employed, notify employer
- ☐ Forward mail

WEEKS 3, 4 AND 5

- ☐ Locate your Mesirow Document Locator and gather your documents
- ☐ Find and inventory all assets
- ☐ Find passwords to all online accounts
- ☐ Focus on will and estate plan – submit final Will to probate (may need to hire counsel)
  - ☐ Obtain letters of office, confirming named executor.
- ☐ Secure all the deceased's property
- ☐ Contact landlord if renting
- ☐ Attend to last wishes
- ☐ Keep bills current
- ☐ Contact insurance companies (life, auto, renters). Terminate policies.
- ☐ Close accounts as required
- ☐ Contact banks and other financial institutions to repaper or close accounts as required
- ☐ Send death certificate to a credit agency
- ☐ Manage Crypto accounts

WEEK 5 AND BEYOND

- ☐ Close credit card accounts (once you have verified that all online payments have been notified)
- ☐ Cancel driver's license
- ☐ Manage air and related miles/rewards with credit cards, etc
- ☐ Delete or memorialize social networks
- ☐ Close email accounts
- ☐ Update voter registration
- ☐ Cancel mobile phone
- ☐ Determine what to do with the deceased's Passport

About Mesirow

Mesirow is an independent, employee-owned financial services firm founded in 1937. Headquartered in Chicago, with locations around the world, we serve clients through a personal, custom approach to reaching financial goals and acting as a force for social good. With capabilities spanning Global Investment Management, Capital Markets & Investment Banking, and Advisory Services, we invest in what matters: our clients, our communities and our culture.

Mesirow Wealth Management is the firm's founding capability. We are the initial namesake business of Norman Mesirow, whose vision was to serve with purpose, applying the highest standards of professionalism in advising individuals and families on their most important life goals.

We look forward to having an opportunity to serve you and your family.