

Legacyki™ First 48 Hours Checklist

What your family needs to do when something happens.

Print this. Keep it with the Legacy Binder. Make sure your trusted person knows where to find both.

IMMEDIATE — FIRST HOUR

- Call 911 if a medical emergency is involved
- Contact immediate family members
- Notify doctor, hospice, or care facility
- Notify employer and/or school if needed
- Do not disturb or move personal belongings
Wait for guidance from the estate attorney or executor

WITHIN 24 HOURS

- Request official death certificates
Order at least 10 certified copies — needed for every account and agency
- Locate the will or trust documents
Check the Legacy Binder — Section 1: Legal Documents
- Contact a funeral home or cremation provider
- Review funeral and burial preferences
See Final Wishes section of the Legacy Binder
- Begin life insurance claim process
Notify every policy holder — do not delay, claims take weeks
- Secure the home and valuables

WITHIN 48 HOURS

- Notify the primary bank
Ask about beneficiary access and joint account procedures
- Contact Social Security Administration
Report the death: 1-800-772-1213 — survivor benefits may apply
- Notify pension and retirement administrators
- Cancel or pause non-essential subscriptions
Streaming, memberships, software — stops ongoing charges
- Forward mail if the address will be unoccupied
- Do NOT make major financial decisions yet
Wait until you have legal and financial guidance

KEY PEOPLE TO CONTACT

- Attorney / Estate Lawyer: _____
- Financial Advisor: _____
- Accountant / CPA: _____
- Life Insurance Co.: _____
- Primary Bank: _____
- Employer HR: _____
- Social Security: _____

WHERE IS THE FULL LEGACY BINDER?

- Physical location: _____
- Digital location: _____
- Safe / key location: _____
- Password manager: _____

MILITARY & FIRST RESPONDERS

- Notify DFAS or military branch immediately
- File SGLI life insurance claim
Up to \$400,000 — 1-800-419-1473 or benefits.va.gov
- Contact VA for Dependency & Indemnity Compensation
- Locate DD-214 discharge paperwork
Required for most VA and military benefits claims
- Contact TSP for survivor beneficiary election

DIGITAL ACCOUNTS TO ADDRESS

- Access email account — see Legacy Binder
- Set Facebook profile to Memorialized
Request via facebook.com/help/deceased
- Transfer or close payment apps
Venmo, PayPal, CashApp, Zelle, crypto wallets
- Cancel streaming and subscription services
- Activate Google / Apple legacy access
Google Inactive Account Manager · Apple Legacy Contact

This checklist is for personal organization purposes only and does not constitute legal, financial, or tax advice. Consult a qualified professional for your specific situation. · Legacyki™ · legacyki.com