



Navigating Life
After a Death

The Landscape of Life After a Death

Movable Pieces Framework and Printable Card Set

After a death, many things feel urgent. Most are not.

This guide helps families sort the work by what to do first, what comes next, what can wait until later, and what may be best handled much later.

Think of these as movable pieces, not fixed rules. What needs to happen first for one family may come later for another.

The Landscape of Life After a Death

After a death, many things feel urgent. Most are not.

The Landscape of Life After a Death includes many kinds of work. This guide helps families sort that work by what to do first, what comes next, what can wait until later, and what may be best handled much later.

This is a practical guide, not a rigid sequence. Think of these as movable pieces, not fixed rules. What needs to happen first for one family may come later for another.

1. Family Teamwork

Definition: The work of helping family members get aligned on goals, roles, priorities, communication, and decision-making so they can move forward together instead of getting stuck, overwhelmed, or pulled apart.

Do First

- Identify who is involved and who needs to be part of key decisions.
- Clarify individual and family goals.
- Name immediate priorities so everything does not feel equally urgent.
- Clarify who is taking the lead on what right now and what decisions they can make on their own.
- Agree on a simple way to communicate updates and decisions.

Do Next

- Decide how the family will handle disagreements or stalled decisions.
- Create a shared tracker, notebook, or working document.
- Set a regular rhythm for check-ins, updates, or family meetings.
- Coordinate who will speak with attorneys, banks, realtors, appraisers, and other professionals.
- Identify which tasks require one owner and which require shared input.
- Surface different priorities, assumptions, and stress points before they create bigger conflict.

Do Later

- Rebalance roles if one person is carrying too much.
- Revisit goals as the reality of the situation becomes clearer.
- Address recurring conflict patterns that are slowing progress.
- Improve how decisions are documented and communicated.
- Make longer-term agreements about shared responsibilities, timelines, and expectations.
- Reflect on what is helping the family move forward and what is making things harder.

Much Later

- Talk about what the family learned about working together through the experience.
- Decide what, if any, ongoing coordination is still needed.
- Revisit how the family wants to stay connected around anniversaries, traditions, or future responsibilities.

2. Caregiving Responsibilities

Definition: The work of addressing the ongoing care needs and practical responsibilities that remain for others who depended on the person who died or on the household they helped sustain.

Do First

- Make sure children, pets, dependent adults, and vulnerable household members are safe and cared for.

- Cover immediate medication, food, transportation, and schedule needs.
- Identify any urgent gaps created by the loss of the person's daily support.
- Confirm who is handling critical appointments, routines, and supervision right now.

Do Next

- Stabilize caregiving routines for the coming days and weeks.
- Coordinate school communication, transportation, and activity support for children if needed.
- Review medical appointments, therapy, medications, equipment, and household support needs.
- Clarify who will take over recurring responsibilities the person used to manage.
- Address vet care, feeding, walking, or boarding needs for pets.
- Review any benefits, reimbursements, or services tied to dependents or caregiving.
- Build backup plans in case the initial arrangement is not sustainable.

Do Later

- Adjust caregiving plans as energy, finances, and family capacity become clearer.
- Explore more durable support options for children, dependent adults, or the household.
- Rework schedules, routines, and living arrangements if needed.
- Address emotional support needs that show up over time.
- Update longer-term plans for care, transportation, schooling, or support services.

Much Later

- Reflect on what new caregiving structure is most sustainable.
- Make larger long-term changes to routines, supports, or living arrangements if appropriate.
- Revisit how responsibilities are shared as the family settles into a new reality.

3. Emotional & Life Transition Work

Definition: The inner and relational work of adjusting to the loss, processing grief and other emotions, navigating changing family roles, and beginning to build a life that can carry both the pain of the loss and the reality of what comes next.

Do First

- Make space for grief, shock, and emotional reality. The way you feel is the right way to feel.
- Name all the emotions you are feeling, and reflect on their sources.
- Notice who may need immediate emotional support, extra steadiness, or simple companionship.
- Accept that people may be grieving in different ways and at different speeds.

Do Next

- Process the grief yourself. This makes it much easier to support others. Address some of the sources of emotions you are experiencing.
- Name any major emotional blocks that could interfere with necessary decisions or family cooperation.
- Create space for honest conversations about grief, fear, anger, guilt, regret, relief, or confusion.
- Name the roles the person played in your life and begin to adjust to changing roles and responsibilities.
- Pay attention to conflict that is really grief wearing another face.
- Support children or other vulnerable family members in processing the loss.
- Encourage rest, pacing, and emotional breathing room alongside practical work.
- Consider counseling, support groups, spiritual support, or coaching where appropriate.
- Begin talking about what life looks like now, even if the answers are incomplete.

Do Later

- Work through unresolved feelings, unfinished business, and identity changes that emerge over time.
- Revisit routines, traditions, and habits that no longer fit the new reality.

- Make room for deeper reflection, healing, and personal peace.
- Address emotional patterns that may have shaped family conflict, avoidance, or paralysis.
- Continue adapting to role changes, loneliness, anniversaries, and triggers.

Much Later

- Reflect on how the loss changed the family and each person within it.
- Explore what growth, wisdom, or clarity may have emerged through the experience.
- Continue building a meaningful life that includes the loss without being fully defined by it.

4. Legal, Financial & Administrative

Definition: The work of handling the official, legal, financial, and paperwork-related responsibilities that follow a death, including authority to act, account and benefit management, bills, taxes, notifications, and the many institutions that need to be informed and coordinated.

Do First

- Order death certificates.
- Locate the will, trust, and other key documents.
- Identify who has legal authority or needs to establish it.
- Protect against immediate financial or administrative problems, such as ability to pay bills, missed critical bills, unsecured mail, or unmanaged accounts.

Do Next

- Contact the attorney, trustee, executor, or court as needed to begin formal administration.
- Notify key institutions such as banks, insurers, employers, benefit providers, and Social Security where appropriate.
- Gather account information for bank accounts, brokerage accounts, retirement accounts, credit cards, loans, and recurring bills.
- Review life insurance, pensions, annuities, employer benefits, and survivor benefits.
- Forward or monitor mail and organize incoming paperwork.
- Set up a central system for documents, deadlines, notes, and call logs.
- Track bills, debts, reimbursements, and account actions.
- Review autopay items, subscriptions, and recurring charges tied to the person who died.
- Protect identity and monitor for fraud or misuse.
- Begin sorting out immediate tax, bookkeeping, and cash-flow questions.
- Establish date-of-death values of property, collectibles, and other high-value assets for tax purposes.

Do Later

- Handle probate or trust administration work in fuller detail.
- Transfer or close accounts as authority becomes clear.
- File claims and complete follow-up paperwork with institutions.
- Work through debt questions, reimbursement questions, and estate accounting.
- Address tax filings, final returns, estate income issues, and coordination with a CPA.
- Obtain an EIN for the estate if needed.
- Resolve lingering paperwork, beneficiary, and title questions.
- Continue digital account administration where tied to official or financial matters.
- Archive important records and keep clean documentation of actions taken.

Much Later

- Finish final accounting and close out remaining administrative loose ends.
- Store or archive key records for future reference.
- Revisit any unresolved claims, errors, or delayed institutional issues.

- Simplify future recordkeeping for the family where possible.

5. Home & Property

Definition: The work of securing, maintaining, managing, and making decisions about the physical spaces and property connected to the person who died.

Do First

- Secure the home and any other vulnerable property.
- Make sure utilities, access, and essential maintenance are covered.
- Identify urgent risks involving insurance, damage, weather, safety, or vacancy.
- Confirm who is responsible for immediate property oversight.

Do Next

- Locate keys, alarm information, garage access, titles, and other practical property details.
- Review homeowners, auto, and vacant property insurance issues.
- Stabilize lawn care, snow removal, cleaning, trash, mail, and basic upkeep.
- Document the condition of the property and major items inside it.
- Review vehicles, registrations, insurance, storage, and title-related needs.
- Decide whether property should be kept, transferred, rented, or sold.
- Decide which belongings will be kept, sold, donated, or disposed.

Do Later

- Evaluate what is needed to prepare a home or other property for listing, transfer, rental, or longer-term use.
- Coordinate needed contractors, appraisers, realtors, movers, or cleanout help.
- Work through repairs, deferred maintenance, and cleanup projects.
- Resolve more complex title, ownership, or access questions.
- Consolidate or clear out property spread across multiple locations.
- Decide how to manage storage units, safe deposit boxes, or additional real estate.

Much Later

- Complete sales, transitions, or long-term management plans.
- Make thoughtful decisions about what to preserve, update, or let go in relation to the property.
- Revisit whether the current property plan still fits the family's needs.

6. Belongings

Definition: The work of sorting through personal possessions and deciding what should be kept, shared, valued, donated, stored, sold, or let go.

Do First

- Identify and protect items that are clearly valuable, sensitive, or likely to create conflict.
- Avoid rushed distribution or disposal before the family understands what is there.
- Identify any belongings that need immediate care, documentation, or secure storage.

Do Next

- Decide what needs to be preserved for children, heirs, or future family decisions.
- Create a fair process for family review and distribution where needed.
- Identify collections, antiques, artwork, jewelry, records, or specialty items that may need appraisal.
- Pick a manageable number of rooms.
- Discard and donate those items; seek expert opinions for items in question.

- Document items before major distribution or sale.

Do Later

- Pick another set of rooms and sort what may be discarded, donated, sold, or digitized.
- Create inventory of items to sell.
- Coordinate appraisers, donation pickups/drop offs, and disposal vendors.
- Complete appraisals, sale planning, consignment, donation, or distribution.
- Revisit items that family members were not ready to decide about earlier.
- Preserve especially meaningful, historic, or family-identity items thoughtfully.
- Continue digitizing photos, papers, or memory items where useful.

Much Later

- Coordinate estate sale providers, auction houses, and dealers.
- Return to the most emotionally charged or ambiguous belongings with more perspective.
- Make final decisions about lingering boxes, storage, or unresolved items.

7. Remembrance & Legacy

Definition: The work of honoring the person's life, preserving meaning, and deciding what memories, stories, values, traditions, and contributions should continue forward.

Do First

- Talk about what values, traditions, or pieces of the person's life the family wants to carry forward.
- Make a few grounding choices about how the person will be remembered in the immediate days after the death.
- Gather essential stories, photos, names, or details needed for an obituary, service, or memorial.
- Identify meaningful people, rituals, or touchpoints that can offer comfort and connection early on.

Do Next

- Plan the funeral, memorial, celebration of life, or other remembrance gatherings.
- Write or refine the obituary and memorial materials.
- Collect stories, photos, recordings, recipes, sayings, or traditions worth preserving while the deepest feelings exist.
- Consider meaningful heirlooms, tribute pages, memory books, videos, or shared archives.
- Explore charitable gifts, memorial contributions, or legacy gestures if meaningful.

Do Later

- Build deeper legacy projects such as family histories, albums, recordings, keepsake collections, or annual traditions.
- Revisit decisions about how children and close family members can stay connected to the person's memory once the family has more capacity and clarity.
- Create more lasting ways to preserve stories, values, and identity.
- Mark anniversaries and important dates with more intention.
- Make thoughtful decisions about grave markers, memorial objects, or longer-term rituals.

Much Later

- Reflect on how the person's influence continues to live on in the family.
- Determine the rituals to implement or adapt to keep memory alive.
- Revisit what legacy really means beyond possessions or formal memorials.
- Continue carrying forward what matters most in ways that feel alive and authentic.

Movable Card Set

These cards are designed to be cut out, spread across a kitchen table, and moved around as your family's reality changes. The cards are intentionally sequence-neutral; the guide pages help you decide what belongs first, next, later, and much later.

Family Teamwork

Identify Who Is Involved

Identify who is involved in the work ahead.

Family Teamwork

Include Key Decision Makers

Identify who needs to be part of key decisions.

Family Teamwork

Clarify Individual Goals

Clarify each person's goals.

Family Teamwork

Clarify Family Goals

Clarify shared family goals.

Family Teamwork

Name Immediate Priorities

Name immediate priorities so not everything feels equally urgent.

Family Teamwork

Clarify Who Leads What

Clarify who is taking the lead on what right now.

Family Teamwork

Clarify Decision Authority

Clarify what decisions each person can make on their own.

Family Teamwork

Set Communication Method

Agree on a simple way to share updates and decisions.

Family Teamwork

Handle Disagreements

Decide how the family will handle disagreements or stalled decisions.

Family Teamwork

Create a Shared Tracker

Create a shared tracker, notebook, or working document.

Family Teamwork

Set a Check-In Rhythm

Set a regular rhythm for check-ins, updates, or family meetings.

Family Teamwork

Coordinate With Professionals

Coordinate who will speak with attorneys, banks, realtors, appraisers, and others.

Family Teamwork

Assign Single-Owner Tasks

Identify which tasks need one clear owner.

Family Teamwork

Identify Shared-Input Tasks

Identify which tasks need shared input.

Family Teamwork

Surface Differences Early

Surface different priorities, assumptions, and stress points early.

Family Teamwork

Rebalance Roles

Rebalance roles if one person is carrying too much.

Family Teamwork

Revisit Goals

Revisit goals as the reality of the situation becomes clearer.

Family Teamwork

Address Recurring Conflict

Address conflict patterns that are slowing progress.

Family Teamwork

Improve Documentation

Improve how decisions are documented and communicated.

Family Teamwork

Make Longer-Term Agreements

Make agreements about shared responsibilities, timelines, and expectations.

Family Teamwork

Reflect on What Helps

Reflect on what is helping the family move forward.

Family Teamwork

Reflect on What Hurts

Reflect on what is making progress harder.

Family Teamwork

Talk About What You Learned

Talk about what the family learned about working together.

Family Teamwork

Decide What Coordination Remains

Decide what, if any, ongoing coordination is still needed.

Family Teamwork

Revisit Future Connection

Revisit how the family wants to stay connected around anniversaries, traditions, or future responsibilities.

Family Teamwork

Your Task

Add a task that fits your family's situation.

Family Teamwork

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Caregiving Responsibilities

Stabilize Immediate Care

Make sure children, pets, dependent adults, and vulnerable household members are safe and cared for.

Caregiving Responsibilities

Cover Medication Needs

Cover immediate medication needs.

Caregiving Responsibilities

Cover Food Needs

Cover immediate food needs.

Caregiving Responsibilities

Cover Transportation Needs

Cover immediate transportation needs.

Caregiving Responsibilities

Cover Schedule Needs

Cover immediate schedule needs.

Caregiving Responsibilities

Identify Support Gaps

Identify urgent gaps created by the loss of the person's daily support.

Caregiving Responsibilities

Clarify Critical Coverage

Confirm who is handling critical appointments, routines, and supervision right now.

Caregiving Responsibilities

Stabilize Routines

Stabilize caregiving routines for the coming days and weeks.

Caregiving Responsibilities

Coordinate School Support

Coordinate school communication, transportation, and activity support for children.

Caregiving Responsibilities

Review Medical Support

Review appointments, therapy, medications, equipment, and household support needs.

Caregiving Responsibilities

Take Over Recurring Tasks

Clarify who will take over recurring responsibilities the person used to manage.

Caregiving Responsibilities

Address Pet Care

Address vet care, feeding, walking, or boarding needs for pets.

Caregiving Responsibilities

Review Care Benefits

Review benefits, reimbursements, or services tied to dependents or caregiving.

Caregiving Responsibilities

Build Backup Plans

Build backup plans in case the initial arrangement is not sustainable.

Caregiving Responsibilities

Adjust Care Plans

Adjust caregiving plans as energy, finances, and family capacity become clearer.

Caregiving Responsibilities

Explore Durable Support

Explore more durable support options for children, dependent adults, or the household.

Caregiving Responsibilities

Rework Routines

Rework schedules, routines, and living arrangements if needed.

Caregiving Responsibilities

Address Emotional Needs

Address emotional support needs that show up over time.

Caregiving Responsibilities

Update Long-Term Plans

Update longer-term plans for care, transportation, schooling, or support services.

Caregiving Responsibilities

Reflect on Sustainability

Reflect on what caregiving structure is most sustainable.

Caregiving Responsibilities

Make Bigger Changes

Make larger long-term changes to routines, supports, or living arrangements if appropriate.

Caregiving Responsibilities

Revisit Shared Responsibilities

Revisit how responsibilities are shared as the family settles into a new reality.

Caregiving Responsibilities

Your Task

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Caregiving Responsibilities

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Emotional & Life Transition Work

Make Space for Grief

Make space for grief, shock, and emotional reality.

Emotional & Life Transition Work

Allow Feelings to Be Real

Remember that the way you feel is the right way to feel.

Emotional & Life Transition Work

Name the Emotions

Name the emotions you are feeling.

Emotional & Life Transition Work

Reflect on Their Sources

Reflect on where those emotions are coming from.

Emotional & Life Transition Work

Notice Who Needs Support

Notice who may need extra steadiness, companionship, or support.

Emotional & Life Transition Work

Accept Different Grieving

Accept that people may grieve in different ways and at different speeds.

Emotional & Life Transition Work

Process Your Own Grief

Process your own grief so you can better support others.

Emotional & Life Transition Work

Address Emotional Sources

Address some of the sources of the emotions you are experiencing.

Emotional & Life Transition Work

Identify Emotional Blocks

Name emotional blocks that could interfere with decisions or cooperation.

Emotional & Life Transition Work

Create Honest Conversation

Create space for honest conversations about grief, fear, anger, guilt, regret, relief, or confusion.

Emotional & Life Transition Work

Name the Roles They Played

Name the roles this person played in your life.

Emotional & Life Transition Work

Adjust to Role Changes

Begin adjusting to changing roles and responsibilities.

Emotional & Life Transition Work

Notice Grief in Conflict

Pay attention to conflict that is really grief wearing another face.

Emotional & Life Transition Work

Support Children

Support children in processing the loss.

Emotional & Life Transition Work

Support Other Vulnerable Family

Support other vulnerable family members in processing the loss.

Emotional & Life Transition Work

Encourage Rest

Encourage rest alongside practical work.

Emotional & Life Transition Work

Encourage Pacing

Encourage pacing and emotional breathing room.

Emotional & Life Transition Work

Consider Counseling

Consider counseling, support groups, spiritual support, or coaching.

Emotional & Life Transition Work

Begin Naming the New Reality

Begin talking about what life looks like now, even if the answers are incomplete.

Emotional & Life Transition Work

Work Through Unresolved Feelings

Work through unresolved feelings, unfinished business, and identity changes.

Emotional & Life Transition Work

Revisit Changed Routines

Revisit routines, traditions, and habits that no longer fit the new reality.

Emotional & Life Transition Work

Make Room for Healing

Make room for deeper reflection, healing, and personal peace.

Emotional & Life Transition Work

Address Emotional Patterns

Address emotional patterns that shaped conflict, avoidance, or paralysis.

Emotional & Life Transition Work

Keep Adapting

Continue adapting to role changes, loneliness, anniversaries, and triggers.

Emotional & Life Transition Work

Reflect on the Change

Reflect on how the loss changed the family and each person within it.

Emotional & Life Transition Work

Explore Growth and Wisdom

Explore what growth, wisdom, or clarity may have emerged.

Emotional & Life Transition Work

Build a Meaningful Life

Continue building a meaningful life that includes the loss without being fully defined by it.

Emotional & Life Transition Work

Your Task

Add a task that fits your family's situation.

Emotional & Life Transition Work

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Emotional & Life Transition Work

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Emotional & Life Transition Work

Your Task

Add a task that fits your family's situation.

Legal, Financial & Administrative

Order Death Certificates

Order death certificates.

Legal, Financial & Administrative

Locate Key Documents

Locate the will, trust, and other key documents.

Legal, Financial & Administrative

Identify Legal Authority

Identify who has legal authority or needs to establish it.

Legal, Financial & Administrative

Protect Bill Paying

Protect against problems with paying bills.

Legal, Financial & Administrative

Catch Critical Bills

Protect against missed critical bills.

Legal, Financial & Administrative

Secure the Mail

Protect against unsecured mail.

Legal, Financial & Administrative

Watch Unmanaged Accounts

Protect against unmanaged accounts.

Legal, Financial & Administrative

Begin Formal Administration

Contact the attorney, trustee, executor, or court as needed to begin formal administration.

Legal, Financial & Administrative

Notify Key Institutions

Notify banks, insurers, employers, benefit providers, and Social Security where appropriate.

Legal, Financial & Administrative

Gather Account Details

Gather account information for bank, brokerage, retirement, credit card, loan, and recurring bill accounts.

Legal, Financial & Administrative

Review Insurance Benefits

Review life insurance, pensions, annuities, employer benefits, and survivor benefits.

Legal, Financial & Administrative

Organize Incoming Mail

Forward or monitor mail and organize incoming paperwork.

Legal, Financial & Administrative

Set Up a Central System

Set up a central system for documents, deadlines, notes, and call logs.

Legal, Financial & Administrative

Track Bills and Debts

Track bills, debts, reimbursements, and account actions.

Legal, Financial & Administrative

Review Autopay Items

Review autopay items, subscriptions, and recurring charges tied to the person who died.

Legal, Financial & Administrative

Protect Identity

Protect identity and monitor for fraud or misuse.

Legal, Financial & Administrative

Sort Out Tax Questions

Begin sorting out immediate tax, bookkeeping, and cash-flow questions.

Legal, Financial & Administrative

Establish Date-of-Death Values

Establish date-of-death values of property, collectibles, and other high-value assets.

Legal, Financial & Administrative

Handle Probate Details

Handle probate or trust administration in fuller detail.

Legal, Financial & Administrative

Transfer or Close Accounts

Transfer or close accounts as authority becomes clear.

Legal, Financial & Administrative

File Claims

File claims and complete follow-up paperwork with institutions.

Legal, Financial & Administrative

Work Through Estate Accounting

Work through debt questions, reimbursement questions, and estate accounting.

Legal, Financial & Administrative

Address Tax Filings

Address final returns, estate income issues, and coordination with a CPA.

Legal, Financial & Administrative

Obtain an EIN

Obtain an EIN for the estate if needed.

Legal, Financial & Administrative

Resolve Lingering Questions

Resolve lingering paperwork, beneficiary, and title questions.

Legal, Financial & Administrative

Continue Digital Administration

Continue digital account administration where tied to official or financial matters.

Legal, Financial & Administrative

Archive Important Records

Archive important records and keep clean documentation of actions taken.

Legal, Financial & Administrative

Finish Final Accounting

Finish final accounting and close out remaining loose ends.

Legal, Financial & Administrative

Store Key Records

Store or archive key records for future reference.

Legal, Financial & Administrative

Revisit Delayed Issues

Revisit unresolved claims, errors, or delayed institutional issues.

Legal, Financial & Administrative

Simplify Future Recordkeeping

Simplify future recordkeeping for the family where possible.

Legal, Financial & Administrative

Your Task

Add a task that fits your family's situation.

Legal, Financial & Administrative

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Legal, Financial & Administrative

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Home & Property

Secure the Home

Secure the home.

Home & Property

Secure Other Property

Secure any other vulnerable property.

Home & Property

Cover Utilities

Make sure utilities are covered.

Home & Property

Cover Access

Make sure access is covered.

Home & Property

Cover Maintenance

Make sure essential maintenance is covered.

Home & Property

Identify Property Risks

Identify urgent risks involving insurance, damage, weather, safety, or vacancy.

Home & Property

Confirm Property Oversight

Confirm who is responsible for immediate property oversight.

Home & Property

Locate Keys

Locate keys.

Home & Property

Locate Alarm Information

Locate alarm information.

Home & Property

Locate Garage Access

Locate garage access.

Home & Property

Locate Property Details

Locate titles and other practical property details.

Home & Property

Review Insurance Issues

Review homeowners, auto, and vacant property insurance issues.

Home & Property

Stabilize Basic Upkeep

Stabilize lawn care, snow removal, cleaning, trash, mail, and basic upkeep.

Home & Property

Document Property Condition

Document the condition of the property and major items inside it.

Home & Property

Review Vehicle Needs

Review vehicles, registrations, insurance, storage, and title-related needs.

Home & Property

Decide the Property Plan

Decide whether property should be kept, transferred, rented, or sold.

Home & Property

Decide the Belongings Plan

Decide which belongings will be kept, sold, donated, or disposed.

Home & Property

Prepare for Listing or Use

Evaluate what is needed to prepare a property for listing, transfer, rental, or longer-term use.

Home & Property

Coordinate Outside Help

Coordinate contractors, appraisers, realtors, movers, or cleanout help.

Home & Property

Work Through Repairs

Work through repairs, deferred maintenance, and cleanup projects.

Home & Property

Resolve Ownership Questions

Resolve more complex title, ownership, or access questions.

Home & Property

Consolidate Property

Consolidate or clear out property spread across multiple locations.

Home & Property

Manage Extra Storage

Decide how to manage storage units, safe deposit boxes, or additional real estate.

Home & Property

Complete Transitions

Complete sales, transitions, or long-term management plans.

Home & Property

Decide What to Preserve

Make thoughtful decisions about what to preserve, update, or let go.

Home & Property

Revisit the Property Plan

Revisit whether the current property plan still fits the family's needs.

Home & Property

Your Task

Add a task that fits your family's situation.

Home & Property

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Home & Property

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Home & Property

Your Task

Add a task that fits your family's situation.

Belongings

Protect Valuable Items

Identify and protect items that are clearly valuable.

Belongings

Protect Sensitive Items

Identify and protect items that are sensitive or likely to create conflict.

Belongings

Avoid Rushed Distribution

Avoid rushed distribution or disposal before the family understands what is there.

Belongings

Protect Items Needing Care

Identify belongings that need immediate care, documentation, or secure storage.

Belongings

Preserve for Heirs

Decide what needs to be preserved for children, heirs, or future family decisions.

Belongings

Create a Fair Process

Create a fair process for family review and distribution.

Belongings

Identify Items for Appraisal

Identify collections, antiques, artwork, jewelry, records, or specialty items that may need appraisal.

Belongings

Start With a Few Rooms

Pick a manageable number of rooms.

Belongings

Discard Lower-Risk Items

Discard items that clearly can be discarded.

Belongings

Donate Lower-Risk Items

Donate items that clearly can be donated.

Belongings

Seek Expert Opinions

Seek expert opinions for items in question.

Belongings

Document Before Distribution

Document items before major distribution or sale.

Belongings

Sort the Next Rooms

Pick another set of rooms and sort what may be discarded, donated, sold, or digitized.

Belongings

Create a Sales Inventory

Create an inventory of items to sell.

Belongings

Coordinate Appraisers

Coordinate appraisers, donation pickups or drop-offs, and disposal vendors.

Belongings

Complete Appraisals and Sales

Complete appraisals, sale planning, consignment, donation, or distribution.

Belongings

Revisit Harder Items

Revisit items the family was not ready to decide about earlier.

Belongings

Preserve Meaningful Items

Preserve especially meaningful, historic, or family-identity items thoughtfully.

Belongings

Digitize Memory Items

Continue digitizing photos, papers, or memory items where useful.

Belongings

Coordinate Estate Sales

Coordinate estate sale providers, auction houses, and dealers.

Belongings

Return to Charged Items

Return to the most emotionally charged or ambiguous belongings with more perspective.

Belongings

Make Final Decisions

Make final decisions about lingering boxes, storage, or unresolved items.

Belongings

Your Task

Add a task that fits your family's situation.

Belongings

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Your Task

Add a task that fits your family's situation.

Belongings

Your Task

Add a task that fits your family's situation.

Remembrance & Legacy

Name What Carries Forward

Talk about what values, traditions, or pieces of the person's life should carry forward.

Remembrance & Legacy

Make Early Remembrance Choices

Make grounding choices about how the person will be remembered in the immediate days after the death.

Remembrance & Legacy

Gather Stories and Details

Gather essential stories, photos, names, or details for an obituary, service, or memorial.

Remembrance & Legacy

Identify Comforting Touchpoints

Identify meaningful people, rituals, or touchpoints that can offer comfort and connection early on.

Remembrance & Legacy

Plan the Gathering

Plan the funeral, memorial, celebration of life, or other remembrance gathering.

Remembrance & Legacy

Write the Obituary

Write or refine the obituary and memorial materials.

Remembrance & Legacy

Preserve Stories While Close

Collect stories, photos, recordings, recipes, sayings, or traditions worth preserving while the deepest feelings exist.

Remembrance & Legacy

Consider Legacy Gestures

Consider meaningful heirlooms, tribute pages, memory books, videos, shared archives, or charitable gifts.

Remembrance & Legacy

Build Deeper Legacy Projects

Build deeper legacy projects such as histories, albums, recordings, keepsake collections, or annual traditions.

Remembrance & Legacy

Revisit Children's Connection

Revisit how children and close family members can stay connected to the person's memory.

Remembrance & Legacy

Create Lasting Preservation

Create more lasting ways to preserve stories, values, and identity.

Remembrance & Legacy

Mark Important Dates

Mark anniversaries and important dates with more intention.

Remembrance & Legacy

Decide on Memorial Objects

Make thoughtful decisions about grave markers, memorial objects, or longer-term rituals.

Remembrance & Legacy

Reflect on Lasting Influence

Reflect on how the person's influence continues to live on in the family.

Remembrance & Legacy

Adapt Rituals

Determine the rituals to implement or adapt to keep memory alive.

Remembrance & Legacy

Revisit What Legacy Means

Revisit what legacy really means beyond possessions or formal memorials.

Remembrance & Legacy

Carry Forward What Matters

Continue carrying forward what matters most in ways that feel alive and authentic.

Remembrance & Legacy

Your Task

Add a task that fits your family's situation.

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