KC Estate &
Special Needs Planning

Attorney Ryan Foley
Licensed in MO & KS
info@kcesnp.com

2601 NE Kendallwood Parkway
Ste. 103, Gladstone, MO 64119
816-957-0900

Top 10 things to do FIRST upon incapacity of a loved one

- ☐ Oversee their care as well as that of their dependents and their pets
- ☐ Secure all property (including real estate, vehicles, and valuable tangible personal property)
- ☐ Notify the law firm that prepared their estate planning documents.
- ☐ Determine the status of their long-term care plan
- ☐ Obtain any required documentation of incapacity from their physician(s)
- ☐ Notify all financial institutions (banks, brokers, financial advisors, and insurance agents, etc.)
- ☐ Assume responsibility for day-to-day financial matters using the appropriate legal authority (e.g., Power of Attorney)
- ☐ Keep diligent records of all financial transactions
- ☐ Apply for benefits for which they may be eligible
- ☐ **NEVER** personally assume liability for their debts. When acting under a Power of Attorney, sign in your representative capacity.

KC Estate &
Special Needs Planning

Attorney Ryan Foley
Licensed in MO & KS
info@kcesnp.com

2601 NE Kendallwood Parkway
Ste. 103, Gladstone, MO 64119
816-957-0900

Top 10 things to do FIRST upon death of a loved one

Immediately after death:

- ◻ Review anatomical gift instructions, if any
- ◻ Notify a funeral director and, if applicable, clergy
- ◻ Notify relatives, close friends, business colleagues, and the employer, if applicable
- ◻ Arrange for the care of any dependents or pets
- ◻ Secure the residence, if appropriate

Shortly after death:

- ◻ Obtain multiple certified copies of the death certificate
- ◻ Contact the law firm that prepared their estate planning documents
- ◻ Review estate planning documents and other important papers
- ◻ Locate and inventory assets
- ◻ Notify insurance companies, banks, Social Security, Medicare, and financial and tax advisors