DENVER WEALTH MANAGEMENT, INC. | STANDARD OF CARE

DEATH OF A SPOUSE

If you are struggling with the death of a spouse, please accept our sincerest condolences. We hope this checklist may alleviate some of the financial challenges that you may be facing. For assistance, please do not hesitate to reach out to our team—call our office at (303) 261-8015.

PAPERWORK & CONTRACTS

- [ ] Locate your spouse's will.
- [ ] Make a copy of the death certificate.
- [ ] Obtain a closing letter.
- [ ] File Form 706 (U.S. Estate Tax Return)
- [ ] Draft a list of contacts to notify.
- [ ] Change ownership and titles.
- [ ] Draft a contact list of your spouse's insurers.

ACCOUNTS & FINANCES

Once you have completed the Paperwork & Contracts checklist, complete the following items:

- [ ] Compile a list of accounts to close.
- [ ] Cancel/deactivate your spouse's credit cards.
- [ ] If your spouse had a life insurance policy in place, contact the provider.
- [ ] Draft a list of your spouse's assets.
- [ ] Update your financial plan with your financial professional.
- [ ] Consider downsizing.

| Helping successful individuals address their financial future.