



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.**

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This information is not intended to be a substitute for individualized tax or legal advice. We suggest that you discuss your specific situation with your tax or legal advisor.