



MIRAU

CAPITAL MANAGEMENT, INC

SURVIVORS CHECKLIST



Mirau Capital Management

1860 Sudderth Drive
Ruidoso, NM 88345

Toll Free: 888.668.9327
Phone: 575.258.1273
Fax: 888.539.3924

www.miraucapital.com

Securities and advisory services offered through Madison Avenue Securities, LLC. ("MAS"), a registered broker-dealer and investment advisor. Member FINRA & SIPC. Mirau Capital Management, Inc. and MAS are not affiliated entities. Securities and advisory services offered in the following states: NM and TX.

THINGS THAT NEED TO BE DONE WHEN A LOVED ONE DIES

(KEEP WITH YOUR IMPORTANT DOCUMENTS)

IMMEDIATE

- Contact Mirau Capital Management for guidance, and review and assistance of all retirement and financial accounts.
- Review and update all beneficiary information.
- Obtain signed death certificate and autopsy records (if applicable).
- Within the first 24 hours, look for organ donation records. Check for signed authorization (on the driver’s license or via health care surrogate), and arrange donation immediately.
- Inventory safe deposit boxes and personal papers of the deceased.
- Look for burial insurance policies and prepaid mortuary or cremation society plans.
- Contact mortuary to make burial (or cremation) and funeral arrangements. Arrange for obituary notice.
- Keep records of all payments for funeral and other expenses.
- Contact friends and relatives, and allow them to help you out in this time of need.
- Cancel or rearrange home deliveries or regular elder assistance services, if any (such as Meals on Wheels).
- Obtain certified copies of the death certificate from the mortuary (consider purchasing 10 to 20 copies).
- Arrange care of dependents, (if any).
- Arrange care of pets, (if any).
- Dispose of or arrange for care of any perishable property (food, plants, etc.)
- Evaluate need for security at residence.

30 DAYS

If applicable, notify:

- Social Security Administration to stop checks.
- Department of Health Services if the deceased was receiving Medicare or Medigap support.
- Department of Veterans Affairs.
- Payers of any pensions (such as former employers) or annuities.
- Department of Motor Vehicles to cancel driver’s license to minimize identity theft.
- Credit reporting agencies (Equifax, Experian, and Transunion) to minimize identity theft.
- Postal Service to forward mail.

---- Continued page 3.

30 DAYS

- Locate documents, including will, trust(s), insurance policies and deeds to real estate.

- If there was a living trust, contact:***
 - Successor trustee (trust manager) for eventual distribution of assets.
 - Mirau Capital Management for review and assistance in sorting out and distributing assets.
 - Insurance companies and arrange for any death benefits to be paid to beneficiaries.
 - IRA and pension companies for any death benefits to be paid to beneficiaries.

- If there was no trust and only a will, contact:***
 - County clerk and deposit the original will within 30 days.
 - Executor to begin the probate process with an attorney.
 - Mirau Capital Management for review and assistance in sorting out and distributing assets.

60 DAYS

- Contact CPA regarding any tax or accounting matters.
- Review credit cards and charge accounts, cancel as appropriate.
- Notify all creditors and utility companies.
- Transfer title on jointly held assets.
- Inventory personal effects and arrange for disposition to family members, friends, or charities.
- Check with the three credit reporting agencies to make sure no fraudulent accounts have been opened.
- Cancel email and social media accounts.
- Cancel memberships in organizations.
- Notify your election board.

3 - 6 MONTHS

- If surviving spouse:***
 - Contact Mirau Capital Management for review of finances and revised financial plan.
 - Update your will or trust and other core legal documents.



One of the difficulties facing your heirs after your death will be locating all of the relevant documents to help dispose of your estate in the manner you directed. This Personal Document Locator will help you record the location of your valuable papers, assets and other important items. This is also helpful for keeping track of documents when handling the death of someone else who has passed.

Fill in the blank spaces with specific locations (e.g., file cabinet in den).

We've provided extra space for items particular to your individual situation.

Should you keep all your important documents in a safe deposit box?

No. Safe deposit boxes are excellent for most important financial and legal documents, but there are some documents you shouldn't keep there. Keep your will and life insurance policies somewhere else. Generally, your safe deposit box will be locked upon your death — just when these important documents will be needed most.

PERSONAL	Name _____ Date _____
	Resident address _____ City _____ St ____ Zip _____
	Office address _____ City _____ St ____ Zip _____
	Safe deposit box number _____ Bank address _____
	Birth certificate _____
	Baptismal certificate _____
	Medical records _____
INSURANCE	Burial records _____
	Letters of last instruction _____
	Other _____
	Life _____
	Disability income _____
	Health/medical _____
LEGAL	Long-term care _____
	Homeowner's/renter's _____
	Other _____
	Marriage certificate _____
	Divorce papers _____
	Social Security card(s) _____
	Powers of attorney _____
	Will and trust agreements _____
Veteran's papers _____	
Living will and health care proxy _____	
Other _____	



FINANCIAL

Financial documents _____
 Mortgage papers _____
 Bank/brokerage accounts _____
 Stock and bond certificates _____
 Income tax returns _____
 Gift tax returns _____
 Employee benefit data _____
 Annuities _____
 IRA and the retirement accounts _____
 Other _____

TITLES & DEEDS

Automobile _____
 House _____
 Other real estate _____
 Cemetery plot _____
 Other _____

IMPORTANT PEOPLE

Financial Management Professional: Brian Mirau, Mirau Capital Management, 1860 Sudderth Dr. Ruidoso, NM 88345, (575) 258-1273
 Accountant _____
 Attorney _____
 Banker _____
 Employer _____
 Insurance agent _____
 Stockbroker _____

INSTITUTIONS

Bank (Checking)
 Bank name _____ Account number _____
 Bank address _____ City _____ St ____ Zip _____

Bank (Savings)
 Bank name _____ Account number _____
 Bank address _____ City _____ St ____ Zip _____

Credit Union
 Credit union name _____ Account Number _____
 Credit Union address _____ City _____ St ____ Zip _____

Money Market Fund
 MM fund name _____ Account Number _____
 MM fund address _____ City _____ St ____ Zip _____

Savings Association
 Savings association name _____ Account Number _____
 Savings association address _____ City _____ St ____ Zip _____

Other
 Name _____ Account Number _____
 Address _____ City _____ St ____ Zip _____



Beneficiary Information Contact Information

BENEFICIARIES

Full name: _____
 DOB: _____ SS# _____
 Address: street/PO box _____
 City _____ State _____ Zip _____
 Phone: Cell _____ Home _____
 Email: _____
 Spouse: _____
 Relationship to owner: _____
 Primary contingent percentage _____

Full name: _____
 DOB: _____ SS# _____
 Address: street/PO
 box _____
 City _____ State _____ Zip _____
 Phone: Cell _____ Home _____
 Email: _____
 Spouse: _____
 Relationship to owner: _____
 Primary contingent percentage _____

Full name: _____
 DOB: _____ SS# _____
 Address: street/PO box _____
 City _____ State _____ Zip _____
 Phone: Cell _____ Home _____
 Email: _____
 Spouse: _____
 Relationship to owner: _____
 Primary contingent percentage _____

For any questions or concerns please contact Mirau Capital Management.