THE ESTATE DESK / CALIFORNIA FAMILY CHECKLIST

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The first 30 days after a death

One page for the urgent work. Everything else can wait.

PERSON WHO DIED ______________________ DATE OF DEATH __________ CALIFORNIA COUNTY __________

01 Today through day 3

- ☐ **Work with the funeral home.** Confirm who is filing the death certificate and whether Social Security will be notified.
- ☐ **Order certified death certificates.** Make an institution list first; many families begin with 8-10 copies.
- ☐ **Secure what could be lost.** Protect the home, vehicles, pets, mail, insurance, devices, and important papers.

02 Days 4 through 7

- ☐ **Find the will and trust.** In California, the custodian generally has 30 days after learning of the death to deliver the will to the court clerk.
- ☐ **Build one account list.** Use statements, mail, tax records, and lawful records. Note owners, beneficiaries, balances, and recurring charges.
- ☐ **Keep essential services running.** Preserve property insurance, utilities, security, storage, phone access, and needed cloud records.

03 Days 8 through 30

- ☐ **Identify the legal route.** Separate joint, beneficiary, trust, and solely owned property before contacting institutions.
- ☐ **Check whether probate is needed.** For deaths on or after April 1, 2025, qualifying California personal property up to $208,850 may use a small-estate affidavit; a qualifying primary residence up to $750,000 may use a simplified petition.
- ☐ **Notify benefits and insurers.** Contact employers, pension plans, life insurers, and the appropriate government agencies.
- ☐ **Contact institutions through official channels.** Ask for the deceased-customer checklist for your actual role. Save every case number.
- ☐ **Move recurring payments deliberately.** Cancel nonessential services only after saving records and protecting refunds or property.
- ☐ **Calendar the next deadlines.** Will lodging, court filings, creditor notices, taxes, and property obligations depend on the estate's facts.

Do not do these yet

- ☐ Use the person's passwords or impersonate them.
- ☐ Pay unknown estate bills from your own money.
- ☐ Distribute, sell, or promise property before authority is clear.
- ☐ Cancel insurance, utilities, security, phone, or cloud storage blindly.

Route accounts correctly

JOINT OWNER

Survivor follows the institution's retitling process.

NAMED BENEFICIARY

Beneficiary makes a direct claim; it often avoids probate.

TRUST

Successor trustee uses the trust and certification process.

SOLE OWNER

Estate authority or an eligible simplified transfer may be required.

Full guide

Scan for the sourced checklist, account directory, and county instructions.

THEESTATEDESK.COM/EXECUTOR-CHECKLIST-CALIFORNIA/

Primary sources: California Courts Self-Help; Judicial Council form DE-300 (rev. Apr. 2025); California Probate Code section 8200; CDPH Vital Records; USA.gov Social Security death reporting; USPS.