Guide for Survivors of a Deceased Person

YOUR CHECKLIST

This must be done by the estate

- Inform people of the death
- Plan the funeral - the funeral should take place within a month
- Send the estate inventory to the Swedish Tax Agency within 4 months
- Distribution of the estate and the division of inheritances
- Close accounts and terminate contracts
- Verify that the Swedish Tax Agency has the correct address
- File an income tax return for the estate no later than May 1

ESTATE

Inform people of the death

- ☐ Next of kin must be informed as soon as possible after the death
- ☐ Home Help Service
- ☐ Family, friends, employers, colleagues and neighbours
- ☐ Cleaning company
- ☐ E-mail contacts
- ☐ Associations

Save and sort papers

- ☐ Collect bills, contracts and account statements in a folder or binder
- ☐ Open mail sent to the deceased and to her/his estate
- ☐ Forward mail to the person in charge of the estate

Contact the bank

- ☐ Contact the deceased's bank about bills and discontinue direct debits
- ☐ Draft a power of attorney for the person or persons who will manage the finances of the estate.
  A template for power of attorney is available at Efterlevandeguiden.se
- ☐ Following the distribution of the estate, close the deceased's accounts

Tax return

- ☐ Prepare a tax return for the deceased's company
- ☐ Verify that the Swedish Tax Agency has the correct address
- ☐ Prepare a tax return for the estate. The Swedish Tax Agency will send a form to the address of the estate when the time comes to do this. Tax return must be submitted the calender year after the death.

Mail and change of address

- ☐ Arrange for mail to be forwarded to the person who is in charge of the estate
- ☐ If mail continues to be sent to the deceased, notify the sender of the forwarding address or extend the forwarding of the deceased's mail
- ☐ Verify that the Swedish Tax Agency has the correct address

Other Notes

ESTATE INVENTORY

Prior to the estate inventory

- ☐ Decide whether you will prepare the estate inventory yourself or hire professional help
- ☐ Find out if the deceased had particular wishes about who should handle the estate inventory
- ☐ Find out if there is anything recorded in the Lifearchive of the Swedish Association of Authorised Funeral Homes (Auktoriserade begravningsbyråer)
- ☐ Find out if there is anything recorded in the White Archive at Fonus

After the estate inventory

- ☐ After the estate inventory, carry out the division of property (if the deceased lived with her/his partner and they were not married)
- ☐ Once the estate inventory is completed, write an estate distribution document (if there are numerous inheritors)

Send the estate inventory to the Swedish Tax Agency

- ☐ Once the estate inventory is completed, send the estate inventory to the Swedish Tax Agency. It must submitted no later than 4 months after the death

Other Notes

CERTIFICATES AND COMPENSATION

Certificates and powers of attorney

- ☐ Order a death certificate with a relatives report via the Tax Information Centre (Skatteupplysningen) at 0771-567 567, or through a funeral home
- ☐ Obtain a custody certificate you intend to receive help from someone who is not included in the relatives report
- ☐ Write a power of attorney if a person will be managing the estate and there are numerous parties to the estate

Financial compensation

- ☐ Find out if you are entitled to financial compensation from group life insurance through the deceased's employer
- ☐ Find out if you are entitled to financial compensation from insurance policies
- ☐ Find out if you are entitled to a housing benefit or housing supplement from the Swedish Social Insurance Agency. You must apply for these yourself.
- ☐ If you are a pensioner, find out if you are entitled to a housing supplement from the Swedish Pensions Agency. You must apply for this yourself.

Other Notes

FUNERAL

Before planning the funeral, find out

- ☐ Did the deceased have any special wishes regarding her/his funeral?
- ☐ Did the deceased want to be buried, for her/his ashes to be buried, or for her/his ashes to be scattered in a memorial grove?
- ☐ Investigate various options at funeral homes
- ☐ Find out if the deceased had a White Archive at Fonus specifying her/his funeral wishes
- ☐ Find out if the deceased had a Lifearchive with the Swedish Association of Authorised Funeral Homes (Auktoriserade begravningsbyråer) specifying her/his funeral wishes
- ☐ Find out if the deceased had planned her/his funeral with a Fenix funeral home
- ☐ Find out if there is any funeral insurance

Make funeral preparations

- ☐ Book transport if the funeral is to take place in another town/city
- ☐ Draft and order the publication of the obituary
- ☐ Choose and book an officiant or priest
- ☐ Select a shroud
- ☐ Select music for the funeral ceremony
- ☐ Select decorations for the funeral ceremony
- ☐ Choose and book a venue for a funeral in a church, chapel or other location
- ☐ Book an organist or musician for the funeral ceremony
- ☐ Invite guests to the funeral and memorial service
- ☐ Order food and drink for the memorial service
- ☐ Order flowers for the funeral ceremony
- ☐ Save receipts for funeral expenses, as documentation for the estate inventory
- ☐ If the ashes are to be scattered outside a memorial grove, apply to the County Administrative Board for permission
- ☐ Arrange for a burial plot

Inform people about the funeral

- [ ] Relatives
- [ ] Next of kin
- [ ] Friends and acquaintances
- [ ] Employers, colleagues, neighbours
- [ ] Association members

After the funeral

- [ ] Send thank you cards to those who attended the funeral or sent flowers
- [ ] Order a headstone
- [ ] The estate pays for the funeral. Therefore, collect receipts for expenses relating to the funeral

Other Notes

TERMINATE AND CANCEL

Contracts and subscriptions

- ☐ Cancel phone subscriptions
- ☐ Terminate or transfer contracts for electricity, refuse collection, internet, TV
- ☐ Terminate or transfer home insurance and other insurance policies
- ☐ Terminate or transfer any leases
- ☐ Cancel phone subscriptions
- ☐ If the deceased had a right of burial, transfer it to a living person

Social media accounts

- ☐ Blogs and personal pages on the internet
- ☐ Facebook
- ☐ Instagram
- ☐ Twitter
- ☐ LinkedIn
- ☐ Other social media

Memberships

- ☐ Associations
- ☐ Membership in organisations
- ☐ Book clubs
- ☐ Bonus memberships

Loans and bank accounts

- ☐ Contact the bank to settle or overwrite mortgages
- ☐ Contact the bank to close the estate's bank accounts

Proof of ownership and land registrations

- ☐ If the deceased had property, change the name on the land registration to another person. Apply for a land registration from the Swedish Mapping, Cadastral and Land Registration Authority.
- ☐ Change the certificate of ownership of the deceased's vehicle with the Swedish Transport Administration

Music and movie streaming services

- ☐ C More
- ☐ HBO
- ☐ Netflix
- ☐ Plejmo
- ☐ SF Anytime
- ☐ Spotify
- ☐ Viaplay

Other Notes

HOME AND HOUSEHOLD

Residence

- ☐ If the deceased lived alone, empty the refrigerator, garbage and mailbox
- ☐ Take care of pets
- ☐ If the deceased lived alone, lower the heat in the residence
- ☐ If the deceased lived alone, prevent burglary by attaching timers to light fixtures (for example)
- ☐ Collect spare keys
- ☐ Clean and empty out the deceased's residence
- ☐ If additional people reside at the deceased's address, contact the landlord to sign a new lease
- ☐ Clean and empty out the deceased's residence for sale or termination of the lease
- ☐ Contact insurance companies to terminate or transfer home insurance
- ☐ Contact a broker to sell the deceased's property prior to the distribution of the estate

Save and sort papers and mail

- ☐ Open the mail that comes to the estate
- ☐ Collect the estate's bills, contracts and account statements in a folder or binder
- ☐ Block direct mail advertising that arrives in response to the death

Care and aids

- ☐ Collect the deceased's belongings from the hospital
- ☐ Return aids and alarms
- ☐ Submit any leftover medications to a pharmacy

Other things to do

- ☐ Move any improperly parked cars
- ☐ Shred the deceased's ID card, passport and driver's licence
- ☐ Collect laundry from the laundromat/dry cleaner's and pick up things that had been dropped off for repair
- ☐ See to any boats, holiday homes, allotments

Other Notes