

# 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](http://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 calendar 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



# 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 be 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





# 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



