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
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
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
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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

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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
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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
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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