

GET HELP HANDLING TASKS AND FINANCES AFTER A DEATH

First Steps :

Financial Guide After a Death

Workbook and Seminars

Topics Include:

- Identity theft protection for the deceased
- Document gathering
- Understanding probate and estates
- Obtaining Social Security benefits
- Notifications to employer, banks and social media
- How to make life insurance claims

“This book has been so helpful for the many families that I have served. So many questions are quickly resolved.”

– Hospice Caregiver

“First Steps offers a comprehensive financial workbook that help family members organize all the immediate logistics after experiencing a loss. First Steps is an invaluable resource.”

– Funeral Director

“First Steps is full of checklists, tips and other resources that are helpful to a person navigating a decedent’s financial matters. It includes ample space for note taking and action item lists.”

– Shane Phillips, Author

Additionally Available

- Free weekly seminars

HeartLight
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