

# 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

#### Also Available

- Free seminars



720-748-9908

[info@heartlightcenter.org](mailto:info@heartlightcenter.org)

[www.heartlightcenter.org](http://www.heartlightcenter.org)