Cameron Wealth Management
Growing with You

Workflow Template — Cameron Wealth Management

Template Name: Deceased Client Check List
Last Reviewed:
Action Template Category: Firm Related
Modified: 11/15/2021
Action Template Status: Active
Last Edited By: Tricia Cameron
Owner: Tricia Cameron
First Step completes automatically on add: ☐
Workflow Description/Trigger:

Action Subject: Deceased Client Checklist - Death Certificate
Action Type: Task
Assigned To: Cameron, Tricia
Action Category: Firm Related
Days Until Due:
Action Tag(s): Administrative
Priority:
FYI:
Action Note: Obtain copy of death certificate

Action Subject: Deceased Client Checklist - Junxure
Action Type: Task
Assigned To: Cameron, Tricia
Action Category: Firm Related
Days Until Due:
Action Tag(s): Junxure
Priority:
FYI:
Action Note: Mark person as deceased
Remove deceased from birthday list
If P2 is survivor, move to P1
Update Record Name
Update all contact information
Addresses
Emails
Phone numbers
Update any Classifications and/or Record Tags if applicable
Close any outstanding tasks (actions) if applicable
Update Asset information
Update any Integrations if applicable (ie Constant Contact, Riskalyze, etc)

Action Subject: Deceased Client Checklist - LOA
Action Type: Task
Assigned To: Cameron, Tricia
Action Category: Firm Related
Days Until Due:
Action Tag(s): Administrative
Priority:
FYI:
Action Note: ?Gain current LOA

Action Subject: Deceased Client Checklist - Tax Inheritance Waiver
Action Type: Task
Assigned To: Cameron, Tricia
Action Category: Firm Related
Days Until Due:
Action Tag(s): Administrative
Priority:
FYI:
Action Note: ?Obtain state inheritance tax waiver if applicable

---

Action Subject: Deceased Client Checklist - Trustee Certification
Action Type: Task
Assigned To: Cameron, Tricia
Action Category: Firm Related
Days Until Due:
Action Tag(s): Estate Planning, Estate Settlement, Trust
Priority:
FYI:
Action Note: If account is held in trust, obtain trustee certification showing successor trustee.

If account is not in trust, skip to next step

Action Subject: Deceased Client Checklist - LOA
Action Type: Task
Assigned To: Cameron, Tricia
Action Category: Firm Related
Days Until Due:
Action Tag(s): Administrative, Estate Planning, Estate Settlement
Priority:
FYI:
Action Note: For joint accounts, obtain Letter of Authorization signed by the surviving tenant if the assets are moving anywhere other than his or her own account.

If there is no surviving tenant and assets are moving anywhere other than the last decedent's estate account, obtain Letter of Authorization signed by the executor.

Action Subject:	Deceased Client Checklist - Establish New Account	**Action Type:**	Task
Assigned To:	Cameron, Tricia	**Action Category:**	Client Service
Days Until Due:		**Action Tag(s):**	Account Setup, Estate Planning
Priority:		**FYI:**	

Action Note: Open new account for beneficiary or estate if none exist
Form 1234 Beneficiary Request Form
