

THINGS TO CONSIDER

- 1. Certified Copies of death certificate received
- 2. Meet with lawyer to commence probate proceedings. Provide lawyer with a copy of the will and certified copy of the death certificate
- 3. Notify insurance companies and file claims when applicable
 - A. Life insurance
 - B. Medical, health, disability, travel, & accident
 - C. Pension benefits
 - D. Homeowners
- 4. Notify employer of deceased/ employer pension benefits changed
- 5. Vehicle title transferred
- 6. Car insurance changed
- 7. Attorney appointment
- 8. Apply for appropriate benefits when applicable
 - A. Social Security benefits
 - B. Veteran's burial and survivor benefits
 - C. Workmen's Compensation benefits
- 9. Notify stockbroker
 - A. Change ownership of joint or solely owned stocks (Usually Social Security numbers)
 - B. Cancel direct deposit retirement benefit payments
 - C. Re-establish title of safe deposit box
 - D. Re-establish outstanding mortgages, personal notes, etc
 - E. Apply for all credit life insurance which may exist
- 10. Credit card companies notified
- 11. Cancel appointments made by deceased
- 12. Medical equipment returned to store/ agency
- 13. Notify schools, colleges, etc. about the death
- 14. Notify personal lists at home. (Card list, magazine subscription, etc.)
- 15. Cemetery memorial/ stone or engraving ordered
- 16. Local support group information obtained
- 17. Personal pre-planning of funeral arrangements
- 18. A Survey will be coming in the mail to you, it would be greatly appreciated if you would please complete your input on our service to your family.

If you feel we have provided exceptional service, please consider writing a Google Review.