



STEPHEN COLLINS, Manager | NJ Lic. No. 3355
www.rothgoldsteins.com

Family Follow-Up Checklist

Please retain this information for future use

- ☐ 1. Send acknowledgment cards for memorial donations or shiva packages.
- ☐ 2. Transfer all real estate properties.
- ☐ 3. Notify insurance companies and file claims if applicable:
 - a. Life insurance
 - b. Medical insurance
 - c. Disability insurance
 - d. Travel and accident insurance
 - e. Homeowners insurance
 - f. Automobile insurance
- ☐ 4. Retirement benefits
- ☐ 5. Social Security survivor benefits at 800-772-1213.
- ☐ 6. Veteran's burial and survivor benefits.
- ☐ 7. Pension benefits.
- ☐ 8. Workmens compensation benefits.
- ☐ 9. Notify accountant / tax preparer (unless attorney is preparing final tax returns.)
Provide certified copy of death certificate.
Previously filed tax return forms and current earnings and dividends statements
- ☐ 10. Notify stockbroker, and change ownership of joint or solely owned stocks.
- ☐ 11. Cancel any open orders arranged by deceased.
- ☐ 12. Check on IRA and retirement accounts.
- ☐ 13. Transfer bonds.
- ☐ 14. Notify bank.
- ☐ 15. Change all jointly held accounts and correct tax identification numbers (usually Social Security number).
- ☐ 16. Cancel direct deposit retirement benefit payments
- ☐ 17. Re-establish title to safe deposit box.
- ☐ 18. Re-establish all outstanding mortgages and personal notes.
- ☐ 19. Apply for any credit card life insurance which may exist on loans.
- ☐ 20. Notify Dept. of Motor Vehicles to transfer titles of all registered vehicles, mobile homes and boats registered in the deceased's name.
- ☐ 21. Notify all credit card companies.
- ☐ 22. Apply for all credit card life insurance coverage if applicable.
- ☐ 23. Cancel all individually held credit cards of deceased
- ☐ 24. Cancel deceased's voter registration.
- ☐ 25. Cancel deceased's drivers license.
- ☐ 26. If there is to be an estate, you may need to contact an attorney.