



AtoZ Retirement Planners
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After a Death Occurs – A Checklist

IMMEDIATELY / FIRST FEW DAYS:

Care & Immediate Arrangements

- ☐ Contact the funeral home once the Coroner or appropriate official has approved transfer into their care.
- ☐ Contact your minister, faith leader, or preferred support person.
- ☐ Notify immediate family and close friends. Consider asking one person to notify additional relatives or groups.
- ☐ Arrange care for dependents.
- ☐ Arrange immediate care for pets.

Secure the Home

- ☐ Remove valuables and secure the residence.
- ☐ Take simple steps to make the home appear occupied (timers, lights, mail collection).
- ☐ Dispose of perishables and remove existing refuse.
- ☐ Cancel upcoming appointments (medical, dental, therapy, personal services).

Notify Key Organizations

- ☐ Contact employer (if still employed).
- ☐ Notify religious, civic, fraternal, or community organizations.
- ☐ Request mail forwarding through the Post Office.

LOCATE IMPORTANT DOCUMENTS

Gather these items in one secure folder:

- ☐ Birth certificate
- ☐ Social Security card
- ☐ Will and estate documents
- ☐ Power of Attorney and healthcare directives
- ☐ Marriage certificate
- ☐ Military discharge papers (DD-214), if applicable
- ☐ Burial property documents
- ☐ Funeral pre-arrangement information
- ☐ Life insurance policies
- ☐ Notify the designated Executor or other responsible party, if applicable.

INFORMATION THE FUNERAL HOME MAY NEED

Collect what you can—do not worry if everything is not immediately available.



Personal Information

- ☐ Full legal name
- ☐ Maiden name (if applicable)
- ☐ Home address
- ☐ Social Security Number
- ☐ Date of birth
- ☐ Date of death
- ☐ Age
- ☐ Gender
- ☐ Race / Ethnicity
- ☐ Marital status
- ☐ Spouse's full name

Background Information

- ☐ Highest level of education completed
- ☐ Occupation
- ☐ Place of birth (City & State)

Parents' Information

- ☐ Father's full name and birthplace
- ☐ Mother's full name and birthplace

Veteran Information (if applicable)

- ☐ Service entry date and location
- ☐ Service number
- ☐ Separation date and location
- ☐ Rank / Grade
- ☐ Branch of service

WITHIN 1-2 WEEKS

Estate & Government Notifications

- ☐ Contact an attorney regarding probate and estate administration.
- ☐ Contact Social Security and other agencies that may have been providing benefits.
- ☐ If the deceased was your spouse, ask about survivor benefits.

Household & Administrative Tasks

- ☐ Cancel unnecessary services if the home will remain vacant:
 - Cable / Satellite
 - Internet
 - Phone
 - Newspaper delivery
 - Trash service
- ☐ Cancel unnecessary insurance policies.

Important: Keep homeowner's and auto insurance active until ownership transfers are completed.

- ☐ Cancel active prescriptions.

WITHIN THE FIRST MONTH

Financial & Legal Follow-Up

- ☐ Meet with an attorney regarding probate (if needed).
- ☐ Meet with a tax professional to discuss estate or income tax considerations.
- ☐ File life insurance claims or confirm beneficiaries have done so.
- ☐ Notify voter registration offices.

- ☐ Transfer vehicle titles and cancel driver's license.

Employment & Benefits

- ☐ Contact employer regarding:
 - Retirement accounts (401(k), pension)
 - Company benefits
 - Final wages owed
- ☐ If death was accidental, review insurance policies for additional benefits.
- ☐ Check for benefits attached to credit cards or loans.
- ☐ Contact Veterans Affairs if applicable.
- ☐ Submit any remaining health insurance or Medicare claims.

Financial Accounts & Estate Settlement

- ☐ Order certified death certificates.

Tip: Many families need more than expected—often 10–20 copies depending on the number of institutions involved.

Gather:

- ☐ Real estate deeds
- ☐ Vehicle titles
- ☐ Stock certificates
- ☐ Loan documents
- ☐ Bank statements
- ☐ Retirement account statements
- ☐ Last two years of tax returns
- ☐ Notify creditors in writing.
- ☐ Change ownership on assets and lines of credit.
- ☐ Review and update:
 - Your own Will
 - Power of Attorney
 - Healthcare directives
 - Beneficiary designations

PERSONAL FOLLOW-UP (if applicable)

- ☐ Send acknowledgements for flowers, meals, donations, and support received.
- ☐ Thank pallbearers.
- ☐ Remove your loved one from mailing and marketing lists.
- ☐ Continue monitoring mail and email for additional accounts or organizations requiring notification.

IMPORTANT CONTACTS

Social Security Administration

1-800-772-1213

Department of Veterans Affairs

1-800-827-1000

Credit Reporting Agencies

• Equifax – 1-800-685-1111

• TransUnion – 1-800-888-4213

• Experian – 1-888-397-3742

Helpful Terms

Administrator — Person responsible for settling an estate when there is no will.

Executor — Person named in a will to carry out final instructions.

Estate — Property, accounts, and assets belonging to the deceased.

Inheritance — Assets transferred after death.

Trust — Legal arrangement for managing assets.

Will — Legal document directing distribution of assets.

Affidavit — Written sworn statement.

Certified Document — Officially issued or verified document.

Lien — Legal claim against property.

Notary Public — An individual authorized to witness and certify documents.