

What to do when a loved one dies. A survivor's checklist.

IMMEDIATELY FOLLOWING THE DEATH, YOU SHOULD:

- 1. Contact the funeral home to take your loved one into their care.
- 2. Contact your minister.
- 3. Alert immediate family members and close friends.
- 4. If employed, contact the deceased's employer.
- 5. If applicable, notify agent under Power of Attorney.
- 6. Alert the executor of your loved one's Will.
- 7. Notify religious, fraternal, and civic organizations that your loved one was a member of.
- 8. Notify your attorney regarding the probate of the estate.
- 9. Arrange for the care of any dependents.
- 10. If the deceased had any pets, arrange for their immediate care.
- 11. Remove any valuables from the deceased's home, secure the residence, and take steps to make the home appear to be occupied (for example, use of lamp timers).
- 12. Arrange for the disposal of any perishables left in the deceased's home- such as food, refrigerated items, and existing refuse.
- 13. Alert the Post Office to forward the deceased's mail.
- 14. Locate loved one's important documents: Will Birth certificate Social Security card Marriage license Military discharge papers (DD-214) Deed to burial property Copy of funeral prearrangements Life insurance policies
- 15. Compile the following information that the funeral home will need in order to finalize the death certificate:
 - Deceased's first, middle, and last name Deceased's Maiden Name (if applicable)
 - Deceased's Home Address Deceased's Social Security Number
 - Deceased's Date of Birth Deceased's Date of Death Deceased's Age
 - Deceased's Gender Race/Ethnicity Marital Status Spouse's first and last name
 - Deceased's highest level of education attained Deceased's Occupation
 - Deceased's Place of Birth (City and State) Deceased's Father's Name Birth City
 - Birth State Deceased's Mother's Name Birth City
 - Birth State If your loved one was a Veteran Entered Service Date
 - Entered Service Place Service Number Separated from Service Date
 - Separated from Service Place Grade, Rank or Rating
 - Organization and Branch of Service

WITHIN ONE MONTH OF THE DEATH, YOU SHOULD:

- 1. Consult with an attorney about probate.
- 2. Meet with an accountant to discuss estate taxes.
- 3. File claims with life insurance companies.
- 4. Social Security Administration
If the decedent was your spouse,
inquire about your eligibility for new benefits.

- 5. Notify the Registrar of Voters.
- 6. If the deceased's home is unoccupied, cancel unnecessary home services, such as newspaper delivery, cable service, etc.
- 7. Cancel deceased's prescriptions.
- 8. Contact the Department of Motor Vehicles to cancel deceased's drivers license and transfer titles of all registered vehicles.
- 9. If your loved one was a veteran, inquire about benefits that you may be entitled to through the VA.
- 10. Contact the deceased's employer. Inquire about any 401 (k), pension, or company benefits that the decedent may be entitled to.
- 11. Notify all 3 credit reporting agencies.
- 12. Obtain a current copy of the deceased's credit report.
- 13. If the death was accidental, verify whether benefits are available on existing insurance policies.
- 14. Check for any life insurance benefits available through existing credit card or loan accounts.
- 15. File any outstanding claims for health insurance or Medicare
- 16. Obtain copies of deceased's outstanding bills.
- 17. Locate and/or obtain other important paperwork of the necessary for the settlement of their estate:
 - At least 12 copies of the certified Death Certificates Real estate deeds and titles
 - Stock certificates Real estate titles Loan paperwork
 - Bank and retirement account statements Last 4 years of tax returns
- 18. Advise all creditors in writing that a death has occurred.
- 19. Change ownership of assets and lines of credit.
- 20. Update your Will.
- 21. Update beneficiaries on your life insurance policies, if necessary.
- 22. Send acknowledgment cards for flowers, donations, food, kindness. Also remember to thank pallbearers.
- 23. Organize and distribute decedent's personal belongings.
- 24. Remove loved one's from marketing and mailing lists.

IMPORTANT CONTACT INFORMATION

DEPARTMENT OF VETERAN'S AFFAIRS 1-800-827-1000 www.vba.va.gov/VBA

SOCIAL SECURITY ADMINISTRATION 1-800-772-1213

www.ssa.gov/pgm/links_survivor.htm

CREDIT REPORTING AGENCIES

EQUIFAX 1-800-685-1111 • www.Equifax.com

TRANS UNION 1-800-888-4213 • www.TransUnion.com

EXPERIAN 1-888-397-3742 • www.Experian.com