

# Survivor's Checklist



**Immediately following the death, you should:**

- 1. Contact the funeral home.
- 2. Contact 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 love 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. Contact Social Security Administration and other government offices that may have been making payments to the decedent. 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 benefits.
- 16. Obtain copies of deceased's outstanding bills.
- 17. Locate and/or obtain other important paperwork of the deceased that will be 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. Sent acknowledgement cards for flowers, donations, food, or any significant gestures of 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 Veterans Affairs

1.800.827.1000      [www.vba.va.gov/VBA](http://www.vba.va.gov/VBA)

### Social Security Administration

1.800.772.1213      [www.ssa.gov/pgm/links\\_survivor.htm](http://www.ssa.gov/pgm/links_survivor.htm)

### Credit Reporting Agencies

1. Equifax      1.800.685.1111      [www.equifax.com](http://www.equifax.com)
2. Trans Union      1.800.888.4213      [www.transunion.com](http://www.transunion.com)
3. Experian      1.888.397.3742      [www.experian.com](http://www.experian.com)