



Things to Remember Checklist

After a loved one dies, you will need to contact many different groups and organizations. This checklist will help you determine who to contact.

- If you need additional death certificates, contact the funeral home. They can either order the certificates for you or direct you to the appropriate county office.
- File insurance claims for each policy held. Contact each company for a claim form (you will need a certified copy of the death certificate for each one).
- File appropriate health insurance claims and notify them of the death that has occurred.
- Notify your home, business, and automobile insurance companies.
- Contact Social Security about your benefits, appropriate forms and procedures (800-772-1213).
- If your loved one was a veteran, contact the Veterans Administration. Ask them about benefits, appropriate forms and procedures (800- 827-1000).
- Talk to your attorney about probating the will and making other necessary filings.
- Make arrangements to update your will or living trust, if necessary. If your loved one who has died was a beneficiary, you will need to select a new one.
- Transfer assets into your name or trust, as appropriate.
- Revise titles on your vehicle(s) and other titled property.
- Contact your loved one's bank(s) for revising or closing out checking/savings accounts and safe deposit boxes.
- If the deceased did not reside in the same household as next of kin, contact USPS to forward mail via www.USPS.com.
- Correct the tax identification number on financial accounts that are in the name of the deceased.
- Cancel direct deposit payments that are in the name of the deceased.
- Change beneficiaries on insurance policies, retirement accounts, savings bonds, etc.
- Contact creditors for all mortgages, personal notes, credit card companies, etc. in which the name of the deceased is involved.
- Change the account name for the certificates of deposit and other accounts in which the name of the deceased is involved.
- Change ownership of joint or solely-owned stocks and bonds.
- Transfer or close I.R.A. and retirement accounts or other investments managed by brokers.
- Take care of any digital assets. For instance, create a plan for online subscriptions, social media accounts, online financial accounts, websites or blogs, online businesses, and digital files such as photos, videos, and documents.
- If your income will change significantly, you should make a plan for paying debts and obligations.
- If needed, contact the funeral home to order a burial site marker or monument.
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