



# Checklist After Death

- **Call the funeral home** or organ donation program you have selected.
- **If your loved one was a veteran**, you may be able to get assistance with the funeral, burial plot, or other benefits. For information on benefits call the Veterans Administration at 800-827-1000. Also, the phone number for your local Veterans Agency is usually listed under Town Offices. You will need a copy of your loved one's discharge papers.
- Obtain **10-15 copies** of the Death Certificate from your funeral director.
- If your loved one was receiving Social Security benefits, **notify your local Social Security office of the death**, since these benefits, will stop. Overpayments will result in a difficult process of repayment. If you are a surviving spouse, ask about your eligibility for increased benefits. Also, check on benefits that any minor children may be entitled to receive.
- **Contact the health insurance company** or employer regarding terminating coverage for the deceased while continuing coverage for others covered through the policy.
- **Contact the insurance company** for all life insurance policies. You will need to provide the policy number and a certified copy of the death certificate and fill out a claim form. If the deceased is listed as the beneficiary on any other policy, arrange to have the name removed.
- If the deceased was working, **contact the employer** for information on pension plans, credit unions and union death benefits. You will need a certified copy of the death certificate for each claim.
- **Return credit cards of the deceased** with a certified copy of the death certificate, or notify the credit card company if you, as the survivor, want to retain use of the card.
- **Seek the advice of an accountant or tax advisor** about filing the deceased's tax return for the year of the death. Keep monthly bank statements on all individual and joint accounts that show the account balance on the day of death, since you will need this information For the estate tax return.
- **Arrange to change any joint bank accounts into your name.** If the deceased's estate is in trust, check with the Trust Department or Customer Service at the bank.
- If the deceased owned a car, **transfer the automobile title into your name** at the Secretary of State's Office, or if the estate is probated, through Probate Court.
- **Arrange to change stocks and bonds into your name.** Your bank or stockbroker will have the forms.
- Make sure that **important bills**, such as mortgage payments, continue to be paid.

- **Documents you may need to complete the tasks:**

Death Certificates (10- 15 certified copies)  
Social Security Card  
Marriage Certificate  
Birth Certificate  
Birth Certificate for each child, if applicable  
Insurance Policies  
Deed and Titles to Property

Stock Certificates  
Bank Books  
Honorable Discharge Papers for a Veteran and/  
or V.A. Claim Number  
Recent Income Tax Forms and W-2 Forms  
Automobile Title and Registration Papers