

What to Do When a Loved One Dies

a checklist to help you complete important tasks

1 - 3 Days Following the Death

1. Locate the following documents of the loved one:

- | | |
|---|--|
| <input type="checkbox"/> Will | <input type="checkbox"/> Military Discharge Paperwork (DD-214) |
| <input type="checkbox"/> Birth Certificate | <input type="checkbox"/> Deed to Burial Property |
| <input type="checkbox"/> Social Security Card | <input type="checkbox"/> Funeral Pre-arrangements |
| <input type="checkbox"/> Marriage License | <input type="checkbox"/> Life Insurance Policies |

2. To finalize the death certificate, the funeral home will need this information about your loved one:

- | | |
|---|--|
| <input type="checkbox"/> First, Middle and Last Name | <input type="checkbox"/> Highest Level of Education & Occupation |
| <input type="checkbox"/> Date of Birth and Date of Death | <input type="checkbox"/> Maiden Name (if applicable) |
| <input type="checkbox"/> Social Security Number | <input type="checkbox"/> Mother's Name, Birth State/City |
| <input type="checkbox"/> Age, Address, and Birth State/City | <input type="checkbox"/> Father's Name, Birth State/City |
| <input type="checkbox"/> Gender and Race/Ethnicity | <input type="checkbox"/> Marital Status and Spouse's First/Last Name |

If your loved one was a Veteran, the funeral home will need:

- Organization and Branch of Service
- Service Number
- Entered Service Date and Service Place
- Separated Service Date and Service Place
- Grade, Ranking or Rating

*** Be sure to inquire about benefits that you may be entitled to through the VA.**

3. Alert the post office to forward your deceased loved one's mail.

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Within 1 Month Following the Death

- ___ Inquire about probate with an attorney
- ___ Discuss estate taxes with an accountant
- Locate important paperwork necessary for the settlement of their estate:
 - ___ Copies of the certified death certificate
 - ___ Real estate deeds & titles
 - ___ Bank & retirement account statements
 - ___ Loan paperwork
 - ___ Last 4 years of tax returns
 - ___ Stock certificates
- ___ File claims with life insurance policies
- ___ Contact the Social Security Administration and/or other government office to cancel any payments the deceased may have been making
- ___ Notify the Register of Voters
- ___ Cancel unnecessary home services if the home is not occupied (newspaper delivery, cable services, etc.)
- ___ Cancel your loved one's driver's license and transfer all titles of registered vehicles through the Department of Motor Vehicles
- ___ Contact your loved one's employer as you may be entitled to benefits such as a 401(k) and pension
- ___ Notify all three credit reporting agencies, including obtaining a copy of your loved one's credit report
- ___ Check to see if your loved one had life insurance benefits through existing credit card or loan accounts
- ___ File any outstanding claims for health insurance or Medicare, including obtaining copies of your loved one's outstanding bills
- ___ Advise creditors in writing of your loved one's death
- ___ Change ownership of assets and lines of credit
- ___ Update your Will and beneficiaries on life insurance policies, if necessary