



Post-Death Checklist

Please be advised that this checklist provides general information and is not intended as legal advice. For guidance specific to your situation, please seek the guidance of credentialed advisors.

The following tasks will typically require your attention within the first few days and weeks following the death of your loved one:

- If the deceased was a veteran, verify if funeral, burial plot and/or any other material benefits are available to you
- Locate important certificates [i.e. marriage, birth, social security, military discharge, etc.]
- Locate important documents [i.e. property titles/deeds, insurance policies, bank books, stock certificates, etc.]
- Secure 10-15 copies of the Death Certificate for organizations requiring proof of the death
- Notify the Social Security office and find out if you are now eligible for new benefits
- Notify all insurance companies previously insuring the deceased and confirm that the coverage is current [i.e. life, health, car, etc.]
- Notify all active creditors [i.e. home/car/student loan holders, credit card companies, etc.]
- If applicable, ask bank(s) to release any joint bank account funds and set up new bank account(s) in your own name.
- If applicable, contact any prior employers/unions for potential benefit information [i.e. pension plans, 401K/403b retirement saving accounts, etc.]

The tasks below will typically require your attention within the first few months and prior to nine months following the death of your loved one:

- Seek the advice of an accountant or tax advisor as your income, tax filing status and related deductions, credits, etc. may have changed
- If probate is involved, consult a lawyer per the general complexity of this estate activity
- Make sure important bills continue to be paid and seek assistance from a health insurance representative regarding any pending medical bills of concern
- After consulting your advisor, arrange to change any existing stocks and bonds into your name [banks have the forms]
- If the deceased owned a car, transfer the title at the Department of Motor Vehicles office
- If applicable, notify any remaining peer groups or professional organizations of the death

Note: It is best to provide death notifications in a written format and to retain copies of these notices for your records.