

## Follow-up Check List things to do after funeral is over...

- Notify insurance companies and file claims, if applicable (Need death certificates)
- Life insurance companies – File claims
- Notify banks.
- Update medical health, disability, travel, and accident insurance
- Notify all credit card life insurance coverage, if applicable
- Notify account/tax preparer (unless attorney prepares final tax returns).
- Provide certified copy of death certificate. Previously filed tax return forms and current earnings and dividends statements.
- Notify financial planner. Change ownership of joint or solely owned stocks and bonds (Financial planner should be able to do this.)
- Cancel any recurring orders or subscriptions, such as Netflix, cable, and cell phone arranged by deceased
- Send acknowledgements for memorial donations and sympathy cards (Get friends help)
- Transfer all real estate properties (Hire a lawyer or escrow company)
- Notify Department of Motor Vehicles to transfer titles of all registered vehicles, mobile homes
  - and boats registered in the deceased's name.
- Cancel all individually held credit cards of deceased
- Change all jointly held accounts
- If a will must be probated, contact your attorney
- Apply for widower/widowed person exemption, if applicable
- Find and update retirement benefits
- Update homeowners insurance
- Update automobile insurance
- Social security survivor benefits (800) 772-1213
- Veteran's burial and survivor benefits ([www.va.gov](http://www.va.gov))
- Pension benefits
- Check on IRA and retirement accounts.
- Change all jointly held accounts and correct tax identification numbers (usually Social Security number)
- Cancel direct deposit retirement benefit payment notes
- Re-establish all outstanding mortgages and personal notes
- Cancel deceased's voter registration
- Cancel deceased's driver's license
- Keep the deceased person's identification and health care card and number handy