

Mary's Follow-up Check List

What to do when the funeral is over

- Send acknowledgement cards for memorial donations, food and sympathy cards (Get friends to help)
- Transfer all real estate properties (Hire a lawyer or escrow company)
- Apply for widower/widowed person exemption, if applicable
- Notify insurance companies and file claims, if applicable (Need death certificates)
- Life insurance companies – File claims
- Update medical health, disability, travel, and accident insurance
- 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)
- Pension benefits
- Notify account/tax preparer (unless attorney is preparing 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
- Check on IRA and retirement accounts.
- Notify banks.
- 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
- Notify Department of Motor Vehicles to transfer titles of all registered vehicles, mobile homes and boats registered in the deceased's name.
- Notify all credit card life insurance coverage, if applicable
- Cancel all individually held credit cards of deceased
- Change all jointly held accounts
- If a will must be probated, contact your attorney
- Cancel deceased's voter registration
- Cancel deceased's driver's license
- Keep the deceased person's identification and health care card and number handy