

# Survivor Checklist

## Obtain Death Certificates at County Clerk

### Who will ask for death certificates?

- Each Life Insurance Company
- Vehicle and Boat transfers
- Pension, IRA or other retirement benefits
- Probate of Will
- Each bank an account is maintained (Banks will take photocopies in most cases)
- State & Federal Tax Returns
- Stocks and Bonds
- Some Credit Card Companies
- Real Estate Transactions
- Government Employee Claims/Pension Claims
- Cable TV Services
- Phone Companies

## How to Obtain a Credit Report

It is important to note that there are three credit bureaus and you will need a report from each bureau. Their contact information is below. You will have to ask for what documents they will require you to complete. The particular documents you will be asked to complete depending upon your relationship with the deceased. Each of the bureaus will also need a copy of a death certificate and the deceased's social security number.

Once you have received the reports, you can then contact each bureau and notify them of your loved ones passing. This is important as it will ensure that your loved one's identity cannot be stolen. Notify all 3 Credit Reporting Agencies

## Locate Important paperwork

- Real Estate Deeds
- Stock Certificates
- Loan Paperwork
- Past Tax Return

- Bank and Retirement Accounts

### **Other Important Tasks**

- Consult with an attorney about probate
- Meet with an accountant to discuss estate taxes
- File Claims with Life Insurance
- Contact the Social Security Administration
- Notify the Secretary of State ( Cancel Drivers License)
- If a homeowner, cancel unnecessary home services
- If Loved one was a Veteran contact the Veterans Association.
- Contact Employer. Inquire about any 401 K, Pension, or Company Benefits
- Check for Life Insurance Benefits available through credit cards
- File any outstanding claims for Health insurance or Medicare
- Change ownership of Assets and Lines of Credit
- Update Will
- Update Beneficiaries on Life insurance Policies
- Update Pharmacy to cancel any ongoing Prescriptions
- Alert Post office to forward mail