

Checklist: What to do after the death of a loved one

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| <ul style="list-style-type: none"> <input type="checkbox"/> Make copies of dated obituary notice <input type="checkbox"/> Obtain copies of death certificates <input type="checkbox"/> Locate marriage and birth certificates <input type="checkbox"/> File for veterans' benefits if applicable <input type="checkbox"/> File for Social Security benefits <input type="checkbox"/> Review the will or living trust <input type="checkbox"/> Order cemetery memorial (marker, monument, niche plate, etc.) <input type="checkbox"/> Notify bank/financial institutions <input type="checkbox"/> File for life insurance benefits <input type="checkbox"/> Transfer car title(s) into your name <input type="checkbox"/> Review auto insurance policy <input type="checkbox"/> Update bills (city utilities, phones, cable, internet accounts, etc.) <input type="checkbox"/> Look into property tax abatement programs | <ul style="list-style-type: none"> <input type="checkbox"/> Update Department of Motor Vehicles license division <input type="checkbox"/> Notify credit reporting agencies (Experian, TransUnion, Equifax, etc.) <input type="checkbox"/> File for employer/retirement benefits (IRA, 401K, pensions, etc.) <p>List health care providers to update records</p> <p>-----</p> <p>-----</p> <p>Contact creditors (list below)</p> <p>-----</p> <p>-----</p> <p>Additional family needs (list below)</p> <p>-----</p> <p>-----</p> |
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Make your final wishes known

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| <ul style="list-style-type: none"> <input type="checkbox"/> Review/complete your health care advance directives (living will) <input type="checkbox"/> Review your life insurance policy beneficiaries and make necessary changes | <ul style="list-style-type: none"> <input type="checkbox"/> Review your health insurance plan for coverage <input type="checkbox"/> Update power of attorney or living trust <input type="checkbox"/> Locate/Review/Discuss advanced funeral plan |
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Notes
