



Checklist - Things to do after the death of a loved one.

- Contact the Social Security Administration at 1-800-772-1213 , Do not cash any checks received for the month in which your spouse died or thereafter. They need to be returned to the SSA. If Social Security benefits were received via direct deposit, you will need to notify your bank also, You also need to check on survivor benefits for both yourself and your children.
- Locate the decedent's letter of instruction, if any.
- Locate and read the last Will and Testament,
- Gather and organize important financial documents and records including:
 - Bank accounts owned by the decedent. Obtain the account balance on mortgages, loans, and checking and savings accounts as of the date of death.
 - Gain access to and inventory any safe. deposit box.
 - Mutual funds owned by the decedent.
 - Certificates of deposit in decedent's name,
 - Stock certificates registered in decedent's name,
 - Any promissory notes under which decedent was entitled to receive payment.
 - Titles to motor vehicles and or mobile homes that are listed in decedent's name.
 - Deeds to real estate property owned by decedent.
 - Any appraisals of jewelry or other valuable personal property owned by the decedent.
- Make appointment with an attorney to discuss, the estate. Bring the Will, financial documents, balances, death certificates, and inventory of safe deposit box to meeting with attorney.
- Notify the insurance company(ies) of the death and request claim forms
- If mortgage insurance on home exists, notify insurance company of death.
- If automobiles are held in joint tenancy, change motor vehicle titles to reflect ownership by only the surviving joint tenant.
- If stocks or bonds are held in joint tenancy, contact stockbroker to change records to reflect ownership by only the surviving joint tenant.
- Determine if any bills must be paid immediately.
- Contact creditors who are demanding immediate payment and notify creditor of death.
- Notify credit card companies of death.
- Cancel credit cards for which decedent was the only signer.
- Obtain bill for last illness from hospital.
- Contact post office to make any necessary changes in delivery of mail.
- Notify work associates.