



SURVIVOR'S CHECKLIST



<u>Today:</u> Get some support-this is an emotionally trying time.	
Notify immediate family and close friends.	
Arrange care for dependents and pets, if any.	
Prepare and arrange for obituary and funeral services.	
Locate safe deposit box, wills, life insurance policies.	
Locate other documents: Accounts, investments, social security benefits, life or death benefits, employee benefits, IRA accounts, real estate property, mortgage documents, vehicle titles.	
Retain and meet with an attorney if there are estate matters.	
Obtain several certified copies of the death certificate.	
Agencies to notify: Social Security, landlords, nursing homes, rentals, insurance companies, employee pensions and plans, Veteran Affairs, banks, credit card companies.	
Notify credit bureaus: Equifax, Experian, Transunion.	
Contact auto and home insurance to report death and update coverage.	
Retitle real estate and other property.	
If a surviving spouse, see a CPA about federal, state and local income tax.	
Cancel memberships.	
Notify the decedent's creditors by mail.	