

- 1. Obtain certified copies of the death certificate.**
- 2. Send acknowledgement cards:**
 - a. To those who sent flowers or brought in food.
 - b. To those who assisted as pall bearers.
 - c. To those who assisted as musicians, custodians, altar assistants, etc.
 - d. To clergy or others who may have spoken at the services.
 - e. To those who gave memorials.
- 3. For any legal questions, notify an attorney.** They will discuss with you probating the will, inheritance and estate taxes, etc. They will also help you draw up or update your own will.
- 4. Notify insurance companies and file claims when appropriate:**
 - a. Life insurance.
 - b. Medical, health, disability, travel, and accident.
 - c. Pension benefits.
 - d. Homeowners insurance.
 - e. Update automobile insurance.
 - f. Change beneficiary on your life insurance policy if the deceased was prior beneficiary.
- 5. Notify employer or pension provider.** Check on any group insurance benefits, survivor's benefits, profit sharing, and/or pension monies to which you may be entitled.
- 6. Transfer vehicle title into your name at the Secretary of State's office or, if estate is probated, through Probate Court.**
- 7. Notify stockbroker:**
 - a. Change ownership of joint or solely owned stocks.
 - b. Cancel any open orders arranged by deceased.
- 8. Notify financial institutions:**
 - a. Change all jointly held accounts and amend tax identification numbers.
 - b. Cancel direct deposit retirement benefit payments.
 - c. Re-establish name on safety deposit box.
 - d. Re-establish mortgages, loans, note, etc.
 - e. If you bank with a credit union, check to see if they supply a life insurance benefit.
- 9. Notify credit card companies:** Ask if the cards of the deceased carry credit life insurance.
- 10. Cancel appointments made by the deceased.**
- 11. Return medical equipment to store or agency.**
- 12. Notify schools, colleges, and professional organizations regarding the death.**
- 13. If the deceased was a member of a labor union,** inquire about any benefits for survivors.
- 14. Keep an up-to-date accounting of all cash income and expenses.**
- 15. Collect any debts owed to the deceased.**
- 16. Get hospital and medical statements as soon as possible.**
- 17. Pay all bills and taxes owed as soon as possible.**
- 18. Review your own financial situation.**
- 19. Be cautious about those who contact you to sell you merchandise,** such as grave markers, cemetery space and merchandise, memorial Bibles, etc.