



The Checklist

Important things to handle when someone passes away

Losing someone is a painful, difficult time.

To help make it easier for you handle all the details that must be dealt with, we've put together a checklist of things you may want to work through. These go above and beyond contacting the deceased's lawyer, reviewing the will if there is one and making final arrangements.

Get started by gathering basic information about the person:

- **Social Security information**
- **Date of birth**
- **Primary/secondary address**
- **Checkbooks**
- **Financial records**

It can also be helpful to have any of these documents belonging to the deceased:

- **Passport**
- **Driver's license**
- **Military I.D. (if a service person)**
- **Citizenship papers/green card/visa (if person originally came from another country)**

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Death certificate

Many government agencies and businesses are going to need a certified copy of the death certificate, so one of your first tasks will be to get at least a dozen certified copies. If you get fewer, you may find yourself having to take time to order more.

Government agencies

Here is a contact list for many of the government agencies that frequently need to be notified of someone's death.

Agency	Telephone	Web	Note
Social Security Administration	1-800-772-1213 (TTY 1-800-325-0778)	www.socialsecurity.gov	Applies to everyone
Your State Dept. of Motor Vehicles	Varies by state	Varies by state	If deceased had a driver's license
U.S. Office of Personnel Management		www.opm.gov/ or www.opm.gov/retirement-services/my-annuity-and-benefits/life-events/death/report-of-death/	If deceased was retired or former federal civil service employee
Veteran's Administration		http://www.cem.va.gov/	If deceased was a veteran, benefits may be available
Defense Finance and Accounting Service	1-800-269-5170		If deceased was retired military
U.S. Citizenship and Immigration Service	1-800-375-5283	www.uscis.gov/portal/site/uscis	If deceased was not U.S. citizen

Financial, insurance, retail companies

Here is a list of the types of companies you may need to contact. We cannot provide specific contact information. It will vary by which companies the deceased used.

Financial institution (you can list names and contact information)	Check
Banks/credit unions/savings and loans	
Credit card companies (many people have several)	
Mortgage companies and other loan providers	
Financial professional/planner, accountant	
Pension/401(k)/403(b)/IRA and personal retirement plan providers	

Insurance company (you can list names and contact information)	Check
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Life insurance	
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Annuities	
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Health insurance	
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Auto insurance	
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Disability insurance	
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Retail and service companies (you can list names and contact information)	Check
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Department stores	
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Cable	
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Internet provider	
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Gas	
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Electric	
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Telephone	
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Other	
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Credit reporting

The three primary credit reporting companies should also be notified of the death. Upon notification, you could also request a copy of the person's credit report. This will help you verify the other companies the deceased did business with that may also need to be notified.

Credit agency	Telephone	Web
Equifax	1-800-525-6285	http://www.equifax.com/home/en_us
Experian	1-888-397-3742	http://www.experian.com/
TransUnion	1-800-680-7289	http://www.transunion.com/

Clubs and associations

Was the person a member of any clubs or associations? They should also be notified.

Organization	Check
Health, sports, golf, swim, etc. clubs	
Unions	
Professional organizations	
Alumni associations	
Roadside assistance, auto club	
Service clubs (Rotary, Lions, Veterans, etc.)	

Looking ahead

Even with a clear to-do list, taking care of these things is a challenge. If you want to help the people who will have to do the same for you some day, consider creating a file that collects all this information about you in one place. It will make things easier for them when the time comes and will be one more kindness you do for those you leave behind.



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