Goldsteins' Rosenberg's
FUNERAL DIRECTORS

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Family Follow-Up Checklist

Please retain this information for future use

- ❑ 1. Send acknowledgment cards for memorial donations or shiva packages.
- ❑ 2. Transfer all real estate properties.
- ❑ 3. Notify insurance companies and file claims, if applicable:
  - a. Life insurance
  - b. Medical insurance
  - c. Disability insurance
  - d. Travel and accident insurance
  - e. Homeowners insurance
  - f. Automobile insurance
- ❑ 4. Retirement benefits
- ❑ 5. Social Security survivor benefits at 800-772-1213
- ❑ 6. Veteran's burial and survivor benefits.
- ❑ 7. Pension benefits.
- ❑ 8. Workers' compensation benefits.
- ❑ 9. Notify account / tax preparer (unless attorney is preparing final tax returns). Provide certified copy of death certificate. Previously filed tax return forms and current earnings and dividends statements.
- ❑ 10. Notify stockbroker, and change ownership of joint or solely owned stocks.
- ❑ 11. Cancel any open orders arranged by deceased.
- ❑ 12. Check on IRA and retirement accounts.
- ❑ 13. Transfer bonds.
- ❑ 14. Notify bank.
- ❑ 15. Change all jointly held accounts and correct tax identification numbers (usually Social Security number).
- ❑ 16. Cancel direct deposit retirement benefit payments.
- ❑ 17. Re-establish title to safe deposit box.
- ❑ 18. Re-establish all outstanding mortgages and personal notes.
- ❑ 19. Apply for any credit card life insurance which may exist on loans.
- ❑ 20. Notify Dept. of Motor Vehicles to transfer titles of all registered vehicles, mobile homes and boats registered in the deceased's name.
- ❑ 21. Notify all credit card companies.
- ❑ 22. Apply for all credit card life insurance coverage if applicable.
- ❑ 23. Cancel all individually held credit cards of deceased.
- ❑ 24. Cancel deceased's voter registration.
- ❑ 25. Cancel deceased's drivers license.
- ❑ 26. If there is to be an estate, you may need to contact an attorney.