After the Funeral Checklist

**Thank you cards**
- Send acknowledgement cards for flowers, donations, food, or any significant gestures of kindness

**Real Estate**
- Transfer of Real Estate properties
- Apply for widowed person exemption
- Apply for Homestead & Disabilities Exemption

**Notify Insurance Companies and File Claims**
- Contact Funeral Director to arrange for Death Certificates for every claim and several extras
- Life insurance
- Medical, Health, Disability, Travel & Accident
- Retirement Benefits & Annuities
- Homeowners
- Car insurance
- Change beneficiaries

**Apply for Appropriate Benefits**
- Social Security Survivors Benefits
- Veterans Burial & Survivors Benefits
- Pension Benefits (contact place of employment)
- Workmen’s Compensation Benefits
- Civil Service
- Railroad Retirement

**Notify Stockbroker**
- Change ownership of jointly or solely owned stocks
- IRA and retirement accounts
- Transfer bonds
- Mutual or other funds

**Notify Banks**
- Change all jointly held accounts
- Cancel direct deposit benefits payments
- Reestablish safe deposit box
- Reestablish all outstanding mortgages, personal notes, etc
- Apply for life insurance which may exist on loans, credit card and mortgages
- Certificates of deposit
- IRA accounts

**Notify Department of Motor Vehicles**
- Transfer titles of all registered vehicles
- Cancel driver’s license
- Cancel voter registration

**Notify all credit card account companies**
- Apply for credit life insurance
- Cancel all individually held credit card accounts
- Change all jointly held accounts

**Notify attorney/accountant/tax consultant**
- If a will must be probated
- If your will needs to be revised for income tax purposes