

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 Survivors Beneficiary

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