

CHECKLIST FOR CLOSING OUT YOUR LOVED ONE'S AFFAIRS

TO BE DONE IMMEDIATELY

- Contact Social Security to discuss benefits. Call the SSA at 1-800-772-1213. The death will automatically be reported by Carewell when we submit the death certificate.
- Contact your loved one's employer
- Contact the Veterans Administration and/or U.S Office of Personnel Management (OPM)
- Locate the will, trust documents, and any powers of attorney

WITHIN 1-2 WEEKS

- Obtain certified copies of your loved one's death certificate
- Write the obituary. You will receive a login via email to update the obituary page.
- File all life insurance claims
- Notify the post office to forward mail (www.usps.com/manage/mail-for-deceased.htm)
- Notify insurance companies (auto, home owner's, pensions, health, Medicare, etc.).
- Notify banks, credit card companies and loan organizations
- Meet with a probate attorney

WITHIN 1-2 MONTHS

- Terminate their driver's license at the DMV to prevent fraud
- Notify your loved one's doctor's office
- Pay any outstanding bills (utilities, internet, cable, rent, etc.)
- Discontinue utilities if needed (including cable, internet, and phone)
- Contact your loved one's cell phone provider and discontinue service

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WITHIN 1-2 MONTHS

- Notify credit reporting and security agencies (Equifax, Experian, TransUnion and Lifelock) to minimize the chance of identity theft
- Notify your loved one's financial advisor
- Close or change social media accounts. Some sites will allow you to change the page to a memorial page and set up someone as the page administrator
- Transfer property titles (house, car, etc.)
- Cancel your loved one's driver's license
- Cancel any outstanding memberships (gyms, professional organizations, phone apps)
- Cancel any subscriptions (magazines, newspapers, streaming services, etc.).
- Identify any insurance policies with your loved one listed as the primary beneficiary, and contact the insurance carrier to make appropriate adjustments.
- Select a grave marker and finalize engraving.
- Send thank you notes

WITHIN THE 1ST YEAR

- File your loved one's final tax return. Do not close their bank account before filing taxes.
- Notify the election board in your loved one's primary state of residence.

Feeling overwhelmed? We have an aftercare specialist that can help walk you through what to do next.