

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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- ☐ 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.