

What to Do After a Death: Checklist of Tasks

First Steps

Below is a checklist of possible agencies to contact and tasks to complete upon the death of a loved one.

- Contact the funeral home and determine what agencies are automatically notified.
- Contact anyone listed as an executor of the estate or power of attorney.
- Arrange for care of minors, pets, or surviving spouse or partner who may need assistance.
- Review funeral plans or service preferences.
- Contact financial institutions and organizations that are not automatically notified.

Contact Financial Institutions

Notify banks, credit card companies, and pension providers about the death. This includes stopping any automatic payments and managing the deceased's accounts.

- Cancel memberships and subscriptions (review bank or credit card statements to find them)
- Identify bills that are likely to be due (e.g. mortgage, car payments, electricity) and do your best to track them down via the person's mail and online accounts. Set up a plan to ensure these bills continue to be paid on time.
- Contact Social Security by phone at 1-800-772-1213. Through Social Security you may be able to apply for survivor benefits. Visit the Social Security website to learn more about their process and find any forms that you may be required to fill out.

Prevent Fraud

Public notice of a death, such as an obituary, can unfortunately provide an opportunity for criminal behavior. Be sure to secure property and be observant for any fraudulent activity.

- Secure home and valuables, lock home and vehicles. Secure valuables like jewelry or heirlooms.
- Forward mail to a responsible party or to the post office.
- Block credit bureaus: Notify Experian, Equifax, and TransUnion to prevent identity theft.
- Cancel driver's license by going online or calling your state's DMV for instructions.

Legal and Financial Matters

Meet with attorney/estate planner to arrange for allocation or transfer of assets per the decedent's trust.

- Order multiple certified copies of the death certificate (needed for most administrative tasks).
- Locate Important Documents: Search for the deceased's will, insurance policies, and any estate planning documents. If there is a will, take it to the appropriate office for probate. Find birth certificate, Social Security card, marriage license, and life insurance policies.
- Contact a tax accountant, you'll need to file a return for both the individual and the estate.
- Leverage your loved one's mail, wallet and any online accounts you have access to in order to identify and close credit accounts.
- Fill out a claim form for any life insurance policies that the deceased had. Also, suggest that friends and family who may have listed your loved one on their own life insurance policies update theirs.

Important Numbers

Social Security Administration: 800-772-1213 (everyone)

Department of Veterans Affairs: 800-827-1000 (decedent was formerly in the military)

Defense Finance and Accounting Service: 866-912-6488 (military service retiree receiving benefits)

Office of Personnel Management: 888-767-6738 (decedent was former federal civil service employee)

U.S. Citizenship and Immigration Service: 800-375-5283 (decedent was not a U.S. citizen)

Institute on Aging Friendship Line: 888-670-1360 (24/7 Lifeline for Older Adults and Caregivers Feeling Isolated, Overwhelmed, or Alone)

Direct Marketing Association: <https://www.ims-dm.com/cgi/ddnc.php> (\$6 fee to register the descendant's name on the Deceased Do Not Contact List)



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