After A Death **Checklist**

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resources for end-of-life realities

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Life can be confusing and complicated after losing a loved one, and everything that needs to be completed can feel overwhelming. This checklist is to help guide you through this time and help you keep track of what you need to do.

- ☐ Make burial & funeral arrangements
    - ☐ Check will/health care directive for directions regarding funeral arrangements & organ donation wishes
    - ☐ Look for pre-paid service documents (burial services or cremation)
    - ☐ Meet with funeral director, cemetery representative, and religious leader as necessary
- ☐ Documents to Collect
    - ☐ Last Will & Testament
    - ☐ Birth Certificate
    - ☐ Marriage Certificate
    - ☐ Death Certificate (multiple copies)
    - ☐ Social Security Number
    - ☐ Citizenship papers
    - ☐ Insurance policies (life, health, credit, car, accident, & property)
    - ☐ Bank books & statements — bank account numbers, names on the account, & account balances
    - ☐ Deeds
    - ☐ Leases & tenant information
    - ☐ Car title & registration — license number and vehicle identification number
    - ☐ Income tax returns (IRS Form 4506)
    - ☐ Veterans Discharge Certificates
    - ☐ Disability claims
    - ☐ Property tax bills & receipts
    - ☐ Credit Card Information
    - ☐ Trusts
    - ☐ Names & Addresses of relatives & beneficiaries

****Please note that this list is not exhaustive of all possible tasks that need to be completed after a death but is a resource to help get the process started and give you some ideas of most of what needs to be handled after a death . ****

- ☐ Documents to Collect — Continued
  - ☐ Stocks — broker name, company name, number of shares, and date of death value
  - ☐ Bonds — serial numbers, issue date, and date of death value
  - ☐ Employment death benefits
  - ☐ Separation agreements, prenuptial agreements, and divorce decrees
  - ☐ IRS form 712 from each life insurance company
- ☐ Who to notify:
  - ☐ Creditors
  - ☐ Banks/credit unions/stockbrokers/financial planners/religious organizations, as appropriate
  - ☐ Post office
  - ☐ Relatives
  - ☐ Employer
  - ☐ Insurance agents: life, auto, health and disability
  - ☐ Fraternal, civic, Veterans, professional & alumni associations
  - ☐ Newspapers regarding death notices
  - ☐ Attorney
  - ☐ Accountant
  - ☐ Beneficiaries
  - ☐ Social Security Administration
  - ☐ Veterans Administration
  - ☐ IRS Form 56: Notice Concerning Fiduciary Relationship
  - ☐ Landlord
  - ☐ Trustees
  - ☐ Defense Finance & Accounting Service (800-269-5170) — military service retiree receiving benefits
  - ☐ Office of Personal Management (888-767-6738) — if deceased is a retired or former federal civil service employee
  - ☐ U.S. Citizenship & Immigration Service — if deceased was not a U.S. Citizen
  - ☐ SC Department of Motor Vehicles — if deceased had a driver's license or state ID
- ☐ Report Death to National Credit Reporting Agencies — Notify the following of the death & request them to list all accounts as "Closed. Account Holder is Deceased." Include a copy of the death certificate.
  - ☐ Experian, 888-397-3742, P.O. Box 4500, Allen, TX 75013
  - ☐ Equifax, 800-525-6285, P.O. Box 105069, Atlanta, GA 30348
  - ☐ TransUnion, 800-680-7289, P.O. Box 6790, Fullerton, CA 92834