Survivor Checklist

- ☐ Request 10 copies of death certificate (funeral director will assist.)

  Deceased Date of Birth: ________________________________

- ☐ Contact Employer regarding group insurance and other benefits.
- ☐ Contact insurance companies (auto, life, health). Have policy numbers available.
- ☐ If deceased was a government retiree or employee, contact Civil Service Personal Management Office (1-888-767-6738).
- ☐ If deceased was retired from the military, contact Defense Finance and Accounting Service (1-800-321-1080).
- ☐ If deceased was a veteran, contact Veterans Administration (1-800-827-1000).
- ☐ Notify Social Security Administration (1-800-772-1213).

  Deceased's Social Security number:_________________________________

  Spouse's Social Security number: __________________________________

- ☐ Check items in safe deposit box.
- ☐ Locate Last Will and Testament and Trust documents.
- ☐ Contact credit card companies and other charge accounts.
- ☐ Check on credit life insurance with all creditors.
- ☐ Locate personal balance sheet (or similar listing of cash, securities, real estate, personal effects, mortgages, and other liabilities).
- ☐ Locate business disposition agreements (buy/sell agreements, partnership agreements, etc.).
- ☐ Call attorney and arrange for meeting to discuss probate and other matters.
- ☐ As time for filing tax return approaches – call accountant, CPA, or tax preparer.