
What are the initial notifications and tasks you should complete after a loved one dies?

___ 1. Initial Notifications

- ___ a. Notify the Social Security Administration (“SSA”) (the funeral home generally makes this notification) (1-800-772-1213)
- ___ b. Claim surviving spouse death benefit with SSA (\$255) (the funeral home usually applies for this benefit) (1-800-772-1213)
- ___ c. Claim deceased spouse’s social security benefits if higher than surviving spouse’s benefits (1-800-772-1213)
- ___ d. Notify pension companies
- ___ e. Notify Medicare
- ___ f. Notify Supplemental insurance provider(s)
- ___ g. Notify VA if receiving Veterans pension and ask about survivor benefits
- ___ h. Notify Medicaid if receiving Medicaid benefits
- ___ i. Notify Credit card companies and gather information to close accounts
- ___ j. Contact life insurance companies to report death and request issuance of claims packet for each policy
- ___ k. Contact post office to forward mail

___ 2. Initial Tasks

- ___ a. Gather documents for meeting with attorney (see attached).
- ___ b. Review bank statements to determine whether any automatic debits are occurring (for life insurance policies, utilities and the like) and whether automatic deposits are occurring.
- ___ c. Prepare a preliminary list of assets – do not immediately remove the decedent’s name from any joint accounts. Wait to remove the decedent’s name until you speak with a probate attorney.
- ___ d. Obtain contact information for family members (full name, address, email and telephone number(s)).
- ___ e. Are real estate taxes paid (May & November)? Is there a homestead exemption on the property (notify Auditor by the end of the year)?