

Post-Death / Survivors Checklist	Person Responsible	Date Completed
1. Notify funeral home (If death occurs out of town, notify your local funeral home which can make all arrangements)		
2. Death Certificates - request (15) Funeral Director will order		
3. Contact your local Social Security Office		
4. Ask relative or friend for assistance		
5. For Veterans; notify local VA office to apply for burial allowance, a flag, a government headstone or marker		
6. Because obituary notices give time and date, plan for a house sitter		
7. Ask a friend to collect all mail for the next few weeks & assure that bills are paid on time		
8. If several assets are in deceased's name only, contact an attorney		
9. Contact Insurance Company for instruction for filing claim		
10. Call every credit card company & bank to verify if there is also an insurance policy in the name of the deceased		
11. Review past six months of spending to develop your monthly Spending Plan (Budget)		
12. Change Will and Beneficiary (Consider including your favorite charity/charities in your list of beneficiaries)		
13. Request <i>Change of Beneficiary</i> forms: IRA, Life Insurance Policies, Pension Plans, 401K Plans, & any other investment or retirement plan		
14. Send out "Thank You" notes to individuals		
15. Open bank account (checking/savings) in your name		
16. Surviving Spouse - do not immediately remove deceased spouse's name from your credit card accounts - suggest waiting 6 months to open account in your name only		