



# Checklist



- If you need additional death certificates, let us know. We will be glad to order them for you or direct you to the appropriate county office.
- File insurance claims for each policy held. Contact each company for a claim form (you will likely need a certified copy of the death certificate for each one).
- File appropriate health insurance claims and notify them of the death that has occurred.
- Notify your home, business, and automobile insurance companies.
- Contact Social Security about your benefits, appropriate forms and procedures (1-800-772-1213).
- Contact the Veteran's Administration, if applicable. Ask them about benefits, appropriate forms and procedures (1-800-827-1000).
- Talk to your attorney about probating the will and making other necessary filings.
- Make arrangements to update your will or living trust, if necessary. If you don't have an attorney, we can recommend one in your area.
- Transfer assets into your name or trust, as appropriate.
- Revise titles on your vehicle(s) and other titled property.
- Contact your bank(s) for revising or closing out checking/savings accounts & safe deposit boxes.
- Correct the tax identification number on financial accounts which are in the name of the deceased.
- Cancel direct deposit payments that are in the name of the deceased.
- Change beneficiaries on insurance policies, retirement accounts, savings bonds, etc.
- Contact creditors for all mortgages, personal notes, credit card companies, etc. in which the name of the deceased is involved.
- Change the account name for the certificates of deposit and other accounts in which the name of the deceased is involved.
- Change ownership of joint or solely owned stocks and bonds.
- Transfer or close I.R.A. and retirement accounts or other investments managed by brokers.
- If your income will change significantly, you should make a plan for paying debts and obligations.
- If needed, contact a Monument Specialist at Snyder Funeral Homes to order a burial site marker or monument.
- Have a Snyder Funeral Homes PrePlanning Specialist help you with planning for your own funeral, burial or cremation. Fill out and sign all documents in advance to ease the burden on your family.

NOTE: This is only a suggested checklist. It is not intended to replace appropriate legal or financial counsel.

*These articles are to be used for educational and reference purposes only. All the benefit information provided herein should be verified with appropriate government offices. Please refer to the Veterans Affairs Benefits website at [www.vba.vo.gov](http://www.vba.vo.gov) and the Social Security website at [www.ssa.gov](http://www.ssa.gov) for more information regarding your own eligibility for benefits.*