

## **A Checklist of Tasks after a Death: A List of People to Notify, Places to Contact after the Death of a Loved One**

The time immediately following the death of a loved one can be overwhelming, with grief and bereavement complicated by a seemingly endless number of tasks. The immediate days following the death will be focused on the funeral or memorial service arrangements. Soon after, however, various financial and legal issues must be addressed. Many people find it very difficult to be sure they have taken care of everything. The following is a list of tasks that are likely to need attention:

- **For a Veteran**, you may be able to get financial assistance with the funeral, burial plot, or other benefits. For information on benefits you can call the U.S. Department of Veterans Affairs at 1-800-827-1000. You may also receive information and assistance in applying for burial benefits by contacting your County Veterans Service Office (CVSO). You will need a copy of your loved one's discharge papers (DD214) to apply for these benefits.
- **Obtain 10-15 copies of the Death Certificate.** For information about obtaining death certificates you may go to <http://www.dhs.wisconsin.gov/vitalrecords/death.htm> or contact the Wisconsin Vital Records Office directly at either (608) 266-1371 (automated) or (608) 266-1373 (service counter).
- **If your Veterans receives Social Security benefits**, notify your local Social Security office of the death, since these benefits will stop. Overpayments will result in a difficult process of repayment. If you are a surviving spouse, ask about your eligibility for increased benefits. Also, check on benefits that any minor children may be entitled to receive. You may call Social Security at 1-800-772-1213 between 7 a.m. and 7 p.m.
- **Contact the health insurance company or employer** regarding terminating coverage for the deceased while continuing coverage for others covered through the policy.
- **Contact the insurance company** for all life insurance policies. You will need to provide the policy number and a certified copy of the death certificate and fill out a claim form. If the deceased is listed as the beneficiary on any other policy, arrange to have the name removed.
- If the deceased was working, **contact the employer for information** on pension plans, credit unions and union death benefits. You will need a certified copy of the death certificate for each claim.
- **Return credit cards of the deceased** with a certified copy of the death certificate, or notify the credit card company if you, as the survivor, want to retain use of the card.
- **Seek the advice of an accountant or tax advisor** about filing the deceased's tax return for the year of the death. Keep monthly bank statements on all individual and joint accounts that show the account balance on the day of death, since you will need this information for the estate tax return.

- **Arrange to change any joint bank accounts into your name.** If the deceased's estate is in trust, check with the Trust Department or Customer Service at the bank.
- **If the deceased owned a car,** transfer the automobile title into your name at the Secretary of State's Office, or if the estate is probated, through Probate Court.
- **Arrange to change stocks and bonds into your name.** Your bank or stockbroker will have the forms.
- **Make sure that important bills,** such as mortgage payments, continue to be paid.

**Documents you may need to complete the tasks:**

- Death Certificates (10 - 15 certified copies)
- Social Security Card
- Marriage Certificate
- Birth Certificate
- Birth Certificate for each child, if applicable
- Insurance Policies
- Deed and Titles to Property
- Stock Certificates
- Bank Books
- Honorable Discharge Papers for a Veteran (DD214)
- Recent Income Tax Forms and W-2 Forms
- Automobile Title and Registration Papers
- Loan and Installment Payment Books and/or Contracts

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