

After a Death

A practical guide for the days and weeks ahead

This handout provides a checklist to help you organize the many tasks that need to be done after a death.

In the Days Ahead

Families have found this checklist useful when handling the affairs of someone who has died. We hope this checklist will also help you.

This list does not include all tasks that may need to be done. Please think about asking a lawyer for guidance, as each situation is different.

Get copies of the death certificate.

The funeral home or cremation service will order copies of the death certificate for you. Or, you can buy copies from the King County Vital Statistics Department. Call 206.897.5100 or visit their website at kingcounty.gov/depts/health/vital-statistics.aspx.

You will most likely need many copies of the death certificate, so that you can send a certified copy to transfer ownership of each major asset. This may include cars, homes, land or bank accounts. You may also need certified copies for life insurance, veteran's survivor benefits and Social Security. To keep costs down, ask these offices if they will accept a non-certified photocopy instead of a certified copy that you will need to buy.

Find out if there is a will.

If there is a will, contact the Personal Representative named in the will. This person is responsible for taking care of the deceased's estate and for following the terms of the will.

Find the papers you will need.

- Marriage certificate, domestic partnership registration, or divorce documents
- Birth certificate
- Social Security card
- Military service papers, including discharge papers
- Will (original copy)
- Property list
- Insurance policies
- Employer benefits or retirement benefits
- Driver's license, passport, citizenship, immigration or alien registration papers
- Financial account numbers
- Safe deposit box information (and key)
- Investment statements
- Credit and debit card numbers and companies
- Vehicle registration and titles
- Funeral contracts, if prepaid

Notify the Social Security Administration.

Call 1.800.772.1213 to report the death. For additional information, visit ssa.gov online. You will need:

- A copy of the death certificate
- Social Security number of the deceased
- Proof of your relationship to the deceased, such as marriage or birth certificate

Also ask about the one-time death benefit payment.

Date you made the call: _____

Person you spoke with: _____

Notes: _____

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If the deceased is a veteran, notify the Veterans Administration (va.gov or 800.827.1000).

Date you made the call: _____

Person you spoke with: _____

Notes: _____

Notify the deceased's employer, union, or any other group or professional organization they may have been a member of.

Many of these organizations have insurance policies. Most likely you will need to provide a copy of the death certificate.

Name of company: _____

Date you made the call: _____

Person you spoke with: _____

Notes: _____

Name of company: _____

Date you made the call: _____

Person you spoke with: _____

Notes: _____

Name of company: _____

Date you made the call: _____

Person you spoke with: _____

Notes: _____

Find passwords and transfer online accounts.

Be sure to note if there are any automatic payment plans for monthly bills, such as electric, heating, phone, cell phones, water, sewer, garbage, home mortgage, car loan, etc.

Notes: _____

Contact the post office with forwarding information.

Date you made the call: _____

Person you spoke with: _____

Notes: _____

Stop delivery of newspapers and magazines.

Name of company: _____

Date you made the call: _____

Person you spoke with: _____

Notes: _____

Name of company: _____

Date you made the call: _____

Person you spoke with: _____

Notes: _____

Cancel home-care services such as meal delivery or nursing services.

Name of company: _____

Date you made the call: _____

Person you spoke with: _____

Notes: _____

Name of company: _____

Date you made the call: _____

Person you spoke with: _____

Notes: _____

Cancel services and utilities (gas, electricity, etc.) that are no longer needed.

Name of company: _____

Date you made the call: _____

Person you spoke with: _____

Notes: _____

Name of company: _____

Date you made the call: _____

Person you spoke with: _____

Notes: _____

Contact the major credit bureaus to help avoid possible identity theft.

Equifax – equifax.com

Date you made the call: _____

Person you spoke with: _____

Notes: _____

Experian – experian.com

Date you made the call: _____

Person you spoke with: _____

Notes: _____

TransUnion – transunion.com

Date you made the call: _____

Person you spoke with: _____

Notes: _____

Notify all insurance companies.

Most likely, you will need to send a certified copy of the death certificate to each company.

Life insurance

Name of company: _____

Date you made the call: _____

Person you spoke with: _____

Notes: _____

Employer's or pension insurance

Name of company: _____

Date you made the call: _____

Person you spoke with: _____

Notes: _____

Funeral insurance or other death-related benefit plans

Name of company: _____

Date you made the call: _____

Person you spoke with: _____

Notes: _____

Mortgage and/or credit insurance

Name of company: _____

Date you made the call: _____

Person you spoke with: _____

Notes: _____

Credit card insurance

Name of company: _____
Date you made the call: _____
Person you spoke with: _____
Notes: _____

Health insurance (including Medicare, Medicaid, Medigap, private), dental insurance, and long-term care

Name of company: _____
Date you made the call: _____
Person you spoke with: _____
Notes: _____

Name of company: _____
Date you made the call: _____
Person you spoke with: _____
Notes: _____

Notify banking and retirement accounts.

Savings accounts or CDs

Name of company: _____
Date you made the call: _____
Person you spoke with: _____
Notes: _____

Checking account

Name of company: _____
Date you made the call: _____
Person you spoke with: _____
Notes: _____

Debit card

Name of company: _____
Date you made the call: _____
Person you spoke with: _____
Notes: _____

Safe deposit box

Name of company: _____
Date you made the call: _____
Person you spoke with: _____
Notes: _____

Retirement accounts (IRA, 401-K, etc.)

Name of company: _____
Date you made the call: _____
Person you spoke with: _____
Notes: _____

Stocks and bonds

Name of company: _____
Date you made the call: _____
Person you spoke with: _____
Notes: _____

Other investments and brokerage accounts

Name of company: _____
Date you made the call: _____
Person you spoke with: _____
Notes: _____

Contact credit card companies.

Name of company: _____
Date you made the call: _____
Person you spoke with: _____
Notes: _____

Name of company: _____
Date you made the call: _____
Person you spoke with: _____
Notes: _____

Name of company: _____
Date you made the call: _____
Person you spoke with: _____
Notes: _____

Transfer ownership of deeds and titles.

- Property deeds
 - Mortgage documents and loan notes
 - Vehicle titles and registrations (for car, boat, RV, and others). Get forms from state offices.
 - Department of Licensing
 - Membership certificates
 - Other: _____
- Notes: _____

Other: _____
Notes: _____

In the coming weeks and months

File all required tax forms.

The IRS has a free booklet called “Tax Information for Survivors and Executors and Administrators,” publication 559.

Accept support for your grief.

Help is available through individual counseling, support groups, bereavement books, websites, and especially from family and friends. People want to reach out to you – please accept their support and love.

Be gentle with yourself.

The death of a loved one is one of the most powerful events we go through in life. Grieving takes time, so allow yourself the time you need to adapt to this major life change. It may help to read the booklet called “Guide through Grief,” which you can find at valleymed.org/griefresources.

Late Fragment

*And did you get what you wanted
from this life, even so?*

I did.

And what did you want?

*To call myself beloved, to feel myself
beloved on the earth.*

- Raymond Carver

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