



Follow-Up Checklist

___ **Send THANK YOU NOTES** for flowers, memorial gifts, food and spiritual remembrances

___ **Obtain copies of DEATH CERTIFICATES**

___ **Make copies of:**

Birth Certificates	Obituary Notice
Marriage License	Licenses
Newspaper Articles	DD214
Certificates of Achievement	Diplomas

___ **Contact Accountant or Income Tax Consultant**

Provide Certified Copy of Death Certificate, previously filed tax return forms, and current earnings and dividend statements

___ **Notify BANK**

Change all jointly held accounts and correct tax identification numbers

Cancel direct deposits, retirement benefit payments and automatic withdrawals

Check contents and re-establish title of Safe Deposit Box

Re-establish all outstanding mortgages, notes, leases,

R.E.C.s, accounts payable, accounts receivable, etc.

Apply for any credit life insurance which may exist on loans, credit cards, and mortgages

Apply for any insurance banks offer as a benefit on checking or savings accounts

___ **Apply for BENEFITS**

- Civil Service Benefits
- Railroad Retirement
- Social Security Survivor Benefits
- Survivor Benefits from Deceased's Employer
- Union Benefits
- Veteran's Burial and Survivor Benefits
- Worker's Compensation Benefits
- Medicare Benefits

___ **Notify:**

- Doctors
- Dentists

___ **Notify Insurance Companies**

- Car Insurance
- Home Owners Insurance
- Life Insurance
- Medical, Health, Disability, Travel and Accident Insurances
- Retirement Benefits, Annuities and Pensions

___ **Transfer of Real Estate Properties**

Contact Assessor's Office for property assessment, notice and changes

Apply for Head of Family Exemption

Apply for Veteran's Exemption

___ **Notify CREDIT CARD Account Companies**

- Apply for all Credit card life insurance coverage
- Cancel all individually held cards of the deceased

___ **Notify STOCKBROKER**

Transfer ownership of joint or solely owned stocks, bonds and mutual funds

Cancel any open orders arranged by the deceased

Check IRA and other Retirement Accounts

___ **Contact www.AnnualCreditReport.com**

Verify there is no activity on the deceased's accounts

___ **Notify Department of Motor Vehicles**

Transfer titles of all vehicles, depending on how titles read

___ **Notify or cancel:**

- Clubs and Organizations
- Cell Phone Account
- Email and Social Network accounts
- Utilities accounts
- Retire voter registration

___ **Consider PRE-ARRANGING your own services**

Use CAUTION when volunteering any information on deceased over the phone



Fremont Chapel of the Roses

1940 Peralta Boulevard
Fremont, CA 94536 (FD 1007)

Fremont Memorial Chapel

3723 Peralta Boulevard
Fremont, CA 94536 (FD 1115)

