



FREMONT  
CHAPEL OF THE ROSES



FREMONT  
MEMORIAL CHAPEL

## 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.AnualCreditReport.com](http://www.AnualCreditReport.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)

