**CHECKLIST**

1. Send acknowledgement Cards for Flowers, Memorial Donations, Food, Spiritual Remembrances

2. Transfer of Real Estate Properties

* Apply for Widowed Person Exemption
* Apply for Homestead & Disabilities Exemption

3. Notify Insurance Companies and File Claims

* Life Insurance
* Medical, Health, Disability, Travel & Accident
* Retirement Benefits & Annuities
* Homeowners
* Car Insurance
* Change Survivors Beneficiary

4. Apply for Appropriate Benefits

* Social Security Survivors Benefits
* Veterans Burial & Survivors Benefits
* Pension Benefits (Contact spouse's place of employment)
* Workmen's Compensation Benefits
* Civil Service
* Railroad Retirement

5. Notify Stockbroker

* Change Ownership of Joint or Solely Owned Stocks
* IRA and Retirement Accounts
* Transfer Bonds
* Mutual or other Funds

6. Notify Bank

* Change all jointly held Accounts
* Cancel Direct Deposit Benefits Payment
* Re-establish Safe Deposit Box
* Re-establish all outstanding Mortgages, Personal Notes, etc.
* Apply for Credit Life Insurance which may exist on Loans, Credit Card & Mortgages
* Certificates of Deposit
* IRA

7. Notify Department of Motor Vehicles

* Transfer Titles of all Registered Vehicles
* Cancel Driver's License
* Cancel Voter Registration

8. Notify all Credit Card Account Companies

* Apply for Credit Life Insurance
* Cancel all individually held Credit Card Accounts of the Deceased
* Change all jointly held Accounts

9. Notify Attorney/Accountant/Tax Consultant

* If a Will must be probated
* If your Will needs to be revised
* For Income Tax Purposes

10. Advanced Planning/Pre-Arrangement

* You may consider Planning in Advance
* Pre-arranging a funeral seems to be very helpful for many families
* It's an effective way to put your wishes in writing