

Survivor's Checklist



IMMEDIATELY:

- Call Journey Hospice.
- Notify family members and friends.
- Notify your employer of your absence.
- Choose a funeral home.
- Make pet care arrangements.

WITHIN A FEW DAYS:

- Locate key documents:
**Use a simple accordion file that is easy to transport.*
 - Will (*to determine your loved one's wishes*)
 - Social Security Card, Driver's license, and/or other ID card
 - Marriage Certificate and Birth Certificate
 - Insurance Policies (*health, home, auto, etc.*)
 - Life Insurance: Contact them ASAP. They can coordinate with the funeral home to cover funeral expenses.
 - Deeds and Titles to property
 - Automobile Title and Registration papers
 - Stock Certificates
 - Honorable Discharge papers for a veteran and/or VA claim number
 - Recent income tax forms and W-2 forms
 - Mortgage Loan information
 - Monthly bills, checkbook, and credit cards (*check wallet*)
- Make Funeral Arrangements.
- Write an Obituary (*visit journeyhospicenj.org/donate for a guide on writing an obituary*).

WITHIN A MONTH:

- Obtain Death Certificate (*at least ten copies*) from the funeral home.
- Contact the Social Security office and notify them of your loved one's passing (1-800-772-1213).
**There is a one-time death benefit to surviving spouses.*
- Car Registration and Title (*switch to survivor's name*)
- Insurances:
 - Gather all policies (health, home, auto, etc.).
 - Change beneficiaries, if needed.
- Make a list of monthly bills and transfer them to survivor's name or finalize.
- Contact all Banks:
 - Joint accounts: Ask bank if you have to close joint and open individual account.
 - Close deceased's individual accounts.
 - Check auto-draft bill payments and make certain they are switched to the survivor or finalized.
- Subscriptions and Online accounts:
 - Cancel or change name.
 - Attend to email, close online accounts, and attend to social media accounts, if applicable.
- Cancel upcoming appointments, events, trips scheduled for loved one.
- Take will to legal county probate office to ensure all debts and liabilities are paid and remaining assets changed to beneficiary.

WITHIN NINE MONTHS:

- File tax return for the deceased.
- Ensure your own estate planning is taken care of.