

FINAL CHECKLIST

STEP 1

SOCIAL SECURITY

- ☐ Funeral home files for death certificate to close social security
- ☐ Deceased's spouse receive your \$225 benefit
- ☐ Call Social Security at 1-800-772-1213 if you haven't received it.

LIFE INSURANCE

- ☐ Find loved ones life insurance policy
- ☐ If you cannot find the policy, use a 3rd party company to locate it.
- ☐ Or reach out to the state in their "unclaimed property" department
- ☐ Contact policy owner and receive your benefits after sending in the death certificate

HEALTH INSURANCE

- ☐ Surviving family members may have to apply for COBRA
- ☐ If they were on medicare/medicade, call 1-800-772-1213 with their ss#
- ☐ Cancel or modify Affordable Care Act accordingly by calling call 1-800-318-2596

VETERANS & LABOR UNIONS

- ☐ Ensure you have copy of DD-214
- ☐ You may use a VA cemetery and receive a plot, marker, vault, flag and opening and closing of plot for vet and spouse
- ☐ If using a public cemetery, vets still may receive flag and marker
- ☐ Labor unions may pay out up to \$15,000 to survivors of person who passed while employed with copy of death certificate
- ☐ Retired employees family may receive up to \$3,000 from union with copy of death certificate

PENSION

- ☐ The Employment Incomen Security Act requires that surviving spouse receive the pension if it was earned
- ☐ If the deceased was a civil servant, fill our form SF2800
- ☐ If the deceased was employed at the time of passing you must also fill out form SF2800 A
- ☐ Forms must be sent to the US Office of Personnel Management Retirement Operations

FINAL CHECKLIST

STEP 2

CREDIT CARDS & DEBT

- ☐ Credit card debt still needs to be paid after someone passes away
- ☐ Find all active cards
- ☐ You may need to sort through financial statements
- ☐ If all else fails, check with credit bureaus
- ☐ Call each card company, provide and close accounts

Debt Obligations

- ☐ The executor is in charge of settling all debt
- ☐ Debt should be paid before assets are divided
- ☐ If you feel that debts outweigh the assets, contact an attorney

Investments

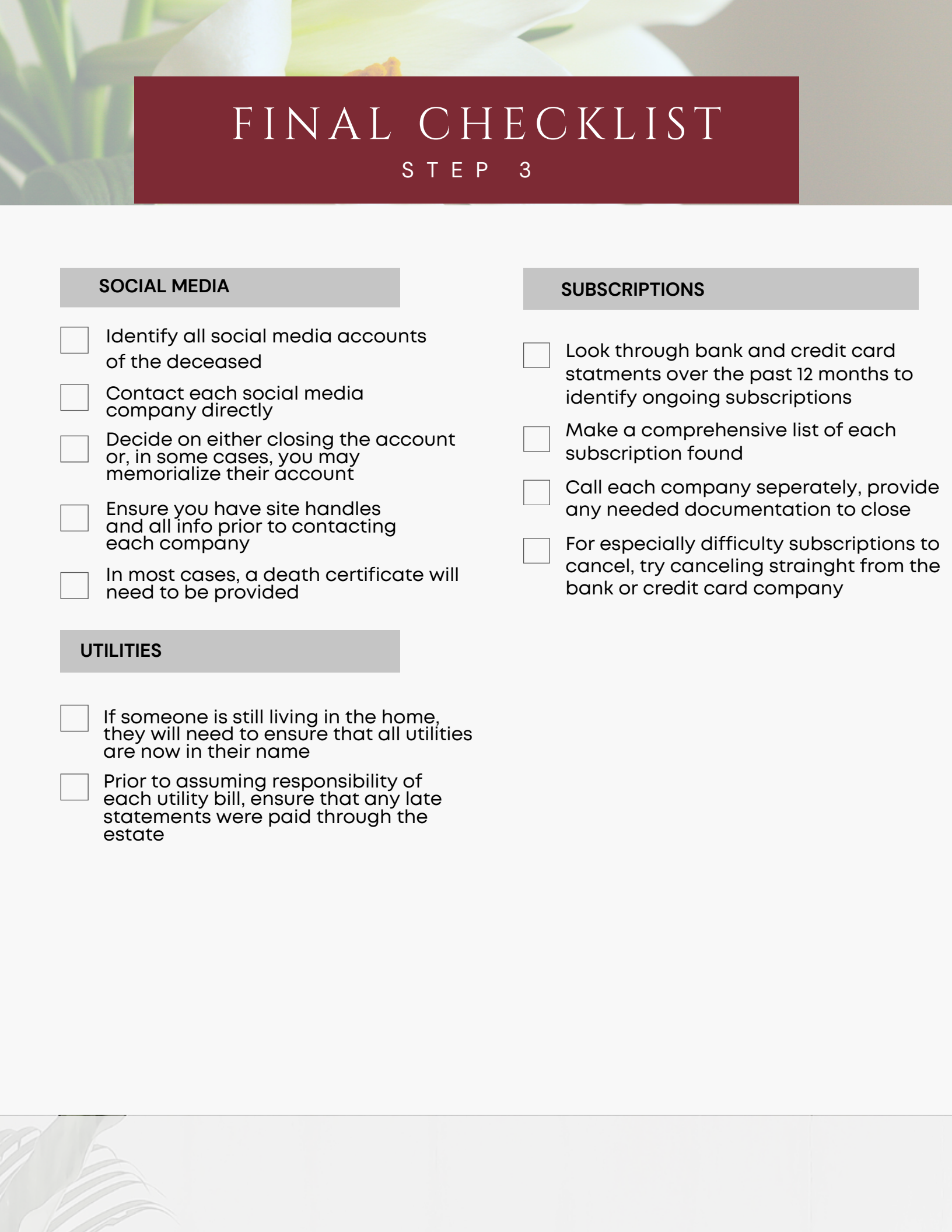
- ☐ If investment are only made known in a will, executor must creat an EIN/ and divide investments as stated
- ☐ Transfer on death designation only needs a death certificate to transfer
- ☐ if the account has a Beneficiary Designation, you will need to mail in a death certificate along with the deceased's info

Real Estate and Probate

- ☐ Surviving spouse whos name is on the title should transfer ownership with the county clerk
- ☐ If the property was owned solely by the deceased, the will dictates ownership
- ☐ If ther is no will and an asserr dispute occurs the estate may go to probate
- ☐ If the assets vaolue is under \$100,000 the case may be handled as non formal probate
- ☐ If questions and disputes arise, it is always best to find an estate attorney.

Taxes

- ☐ When filing taxes, a CPA needs to be made aware of the passing
- ☐ If a tax refund is due, the person claiming must complete IRS form 1310
- ☐ Money owed should be paid through the estate before assets are divided
- ☐ Dif the deceased was a dependant at the time of passing, they may be considered as such for the remainder of that year's filing period



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STEP 3

SOCIAL MEDIA

- ☐ Identify all social media accounts of the deceased
- ☐ Contact each social media company directly
- ☐ Decide on either closing the account or, in some cases, you may memorialize their account
- ☐ Ensure you have site handles and all info prior to contacting each company
- ☐ In most cases, a death certificate will need to be provided

SUBSCRIPTIONS

- ☐ Look through bank and credit card statements over the past 12 months to identify ongoing subscriptions
- ☐ Make a comprehensive list of each subscription found
- ☐ Call each company separately, provide any needed documentation to close
- ☐ For especially difficult subscriptions to cancel, try canceling straight from the bank or credit card company

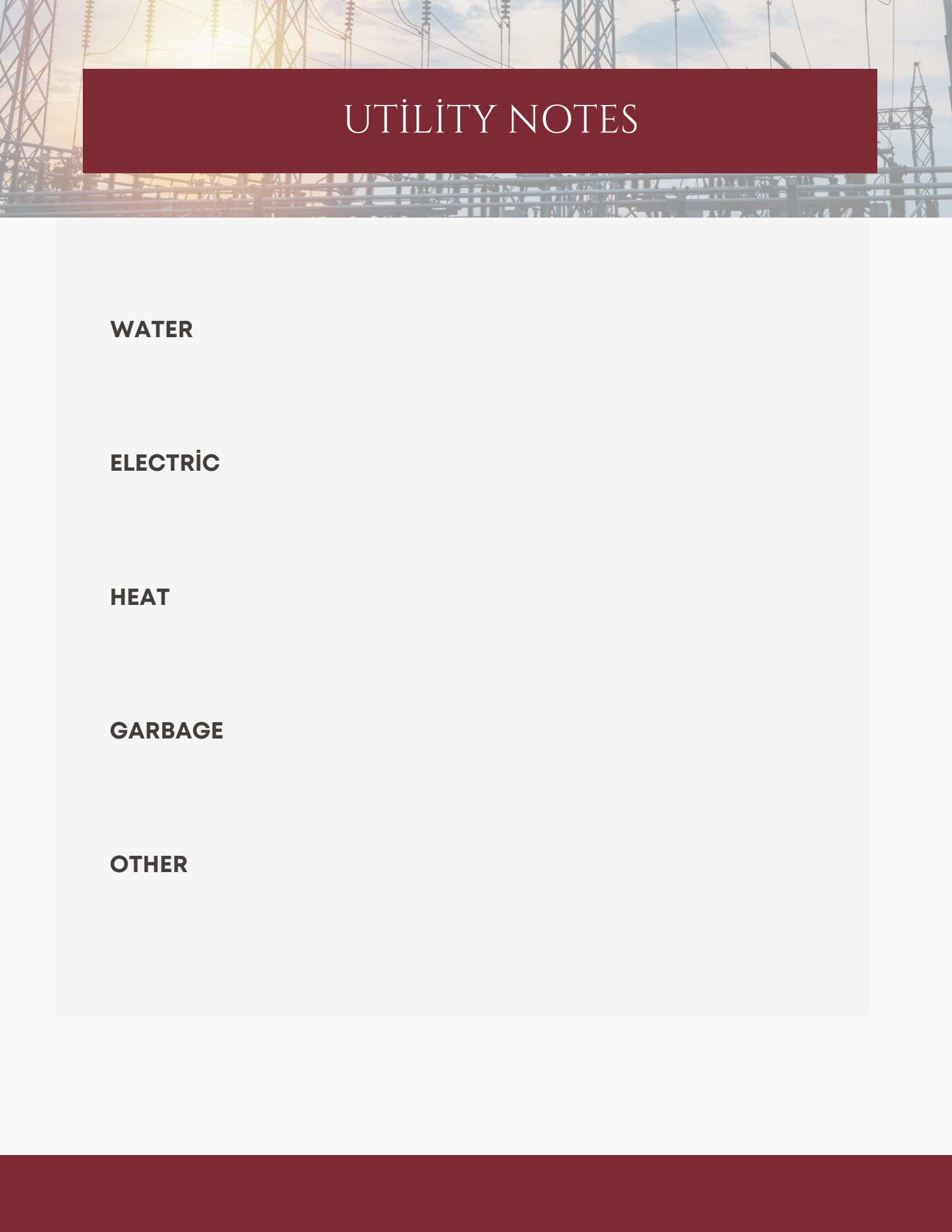
UTILITIES

- ☐ If someone is still living in the home, they will need to ensure that all utilities are now in their name
- ☐ Prior to assuming responsibility of each utility bill, ensure that any late statements were paid through the estate



PASSWORDS

Figure 1. The effect of the number of trials on the number of correct responses. The number of correct responses was plotted against the number of trials for each condition. The error bars represent the standard error of the mean.



UTILITY NOTES

WATER

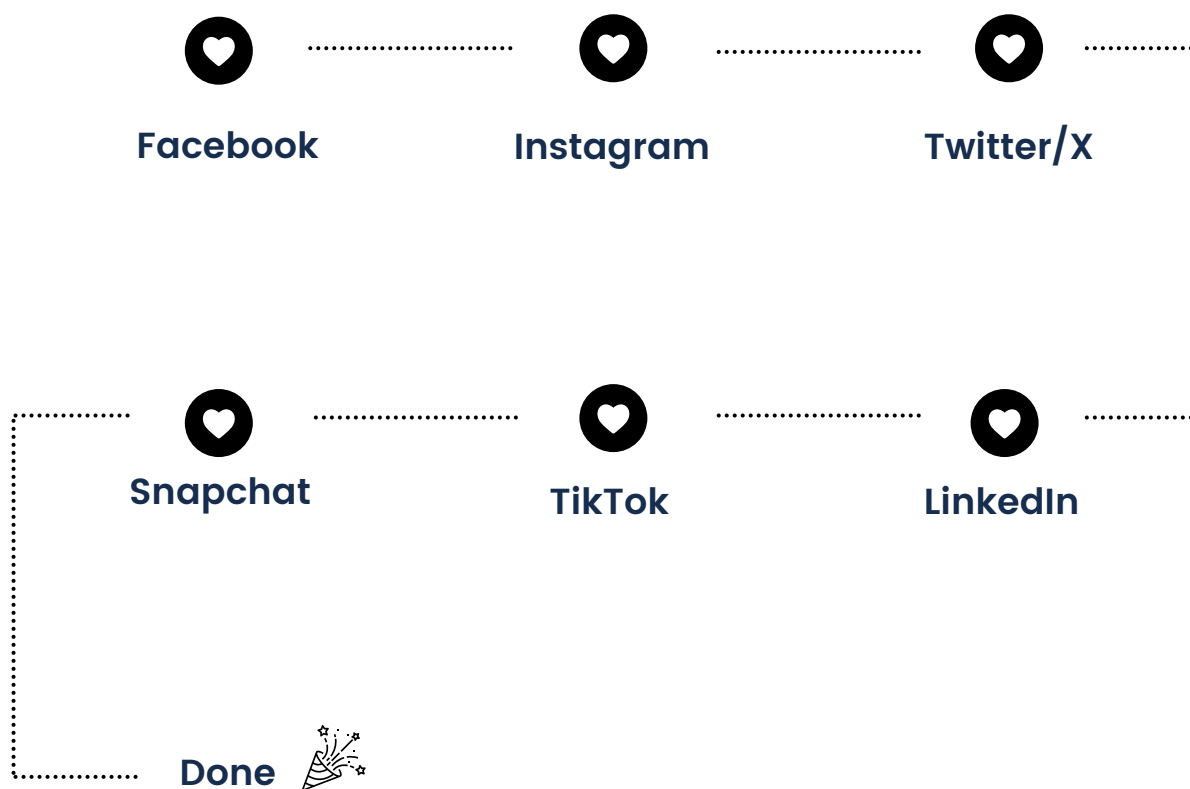
ELECTRIC

HEAT

GARBAGE

OTHER

THE SOCIAL MEDIA ROADMAP



The difference between

Memorialize:

Both Instagram and Facebook allows you to memorialize a loved ones account, essentially freezing it exactly as it was when it was last used. For many, this is a beautiful way to remember a loved ones pictures, words and interactions.

Close

This option permanently deactivates and shuts down a social media account. All accounts listed above provide this option. You can find the links to close these accounts inside your Parting Guide.