

# Family Checklist

We offer this helpful list as a guide to personal and financial issues that may need to be addressed by family members.

**1. Send acknowledgement cards for flowers, memorial donations, food, spiritual remembrances**

**2. Transfer of real estate**

- Apply for Widowed Person Exemption
- Apply for Homestead and Disabilities

**3. Notify insurance companies and file claims**

- Life insurance
- Medical, health, disability, travel, and accident insurance
- Retirement benefits and annuities
- Homeowners insurance
- Car insurance
- Change survivor's beneficiary

**4. Apply for appropriate benefits**

- Social Security survivors benefits
- Veterans burial and survivors benefits
- Pension benefits (contact spouse's place of employment)
- Workmen's compensation benefits
- Civil service benefits
- Railroad retirement benefits

**5. Notify stockbroker**

- Change ownership of joint or solely-owned stock
- 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 cards and mortgages
- Certificate of Deposit (CD)
- Individual Retirement Account (IRA)

**7. Notify credit bureaus**

- TransUnion: P.O. Box 1000, Chester, PA 19022  
transunion.com
- Equifax: P.O. Box 105069, Atlanta, GA 30348  
equifax.com
- Experian: P.O. Box 9530, Allen, TX 75013  
experian.com

**8. Notify Department of Motor Vehicles**

- Transfer titles of all registered vehicles
- Cancel driver's license
- Cancel voter registration

**9. Notify all credit card companies**

- Apply for credit life insurance
- Cancel all individually held credit cards
- Change all jointly held accounts

**10. Notify attorney, accountant, tax consultant**

- If a will must be probated
- If your will needs to be revised
- For income tax purposes

**11. Advanced planning**

You may want to consider pre-arranging your funeral. It's a sensible, caring way to relieve your loved ones from the burden of having to make decisions during an emotionally difficult time.



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