

Beneficiary checklist.



Task

Immediate steps-first week

Responsibility Completed

Call the funeral home		
Notify immediate family to collect mail; locate important items: keys, insurance policies, claim forms		
Notify clergy		
Access safe deposit box		
Write the obituary		
Request death certificates. You can obtain certified copies of the death certificate from the County/State Office of Vital Statistics. Request a few extra copies of the death certificate. You will need certified copies as proof of death.		
Contact current and former employers		
Contact Department of Veterans Affairs (800-827-1000) if deceased served in the military		

Steps to take within one month

Review last will and testament		
Contact life insurance and annuity providers		
Contact insurance agent		
Contact Social Security		
Contact the attorney, if necessary		
Call the accountant		
Apply for an Employer Identification Number (EIN) from the IRS (Federal Identification Number)		
Open estate checking account and close joint account		

Steps to take within six months

Obtain surrogate court certificates		
Pay the bills		
Notify the post office		
Change ownership (of property)		
Appraise assets, if needed		
Notify utility companies		
Notify credit card companies		
Notify Investment firms		
Gather all the deceased's important papers and store: birth certificate, death certificate, marriage certificate, deeds, etc.		
Update or cancel subscriptions for magazines/newspapers — change of address if necessary.		

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