Suggested Death Notifications

When a family member or friend has died, it is important to notify various government agencies, bank, creditors, insurance companied, and credit reporting agencies of the death. To reduce the risk of identity theft, these notifications should be made promptly. To expedite the process, you should initially make phone contact followed by written communication.

Ensure you retain copies of all written communications. The following is a checklist of possible agencies and businesses that should be notified in case of a death. Each situation is unique this list may not be complete.

List of Important Documents:

_ Death certificate (usually 5 – 7copies)
_ Marriage certificate
_ Divorce decree
_ Birth certificate
_ Social Security card for all family members
_ Wills, community property agreements, deeds of trust

Help finding lost wills at: http://www.wsba.org/Resources-and-Services/Find-legal-Help/Will-Search

_ Life insurance policy(s)
_ Title to vehicles and homes
_ DD214 (Certificate of Release or Discharge from Active Duty)

Notify Credit Reporting Agencies

There are three (3) national credit reporting agencies which you should notify of the death and instruct them to list ALL accounts as “CLOSED. ACCOUNT HOLDER IS DECEASED”. You may also request a credit report to obtain a list of all creditors and to review recent credit activities along with a copy of the death certificate.

Experian, www.experian.com
Ph: 1-888-397-3742

Equifax Information Services LLC, www.equifax.com
Ph: 1-800-685-1111, Fax: 1-888-826-0823 (GCC--Global Consumer Care)

TransUnion LLC, www.transunion.com/myoption
1-800-888-4213

Notify Government Agencies

- _ Social Security Administration,
  Active duty deaths, 1-866-777-7887 or Retired, 1-800-772-1213
- _ Veteran's Administration, 1-800-827-1000 (if the decedent was formerly in the military). ber.
- _ Defense Finance and Accounting Service, 1-800-321-1080 (Military retiree receiving benefits)
- _ Office of Personnel Management, 1-888-767-6738 (former federal civil service employee)
- _ Veterans' life insurance, Service Disable Veteran Insurance, 1-800-669-8477
- _ Veteran's Group Life Insurance, 1-800-419-1473
- _ Federal Employee Group Life Insurance, 1-800-633-4542
- _ State Department of Motor Vehicles (If decedent had a driver's license or state ID)
- _ U.S. Postal System

Notify Financial Companies

- _ Bank, saving and loan associations, and credit unions
- _ Credit card and merchant card companies (orders a copy of the credit report to ensure all creditors have been notified)
- _ Mortgage companies and lenders
- _ Financial Planners and stockbrokers
- _ Thrift Saving Program, (www.tsp.gov) 1-877-968-3778 (if decedent is formerly military or former federal civil service employee)

Notify Insurance and Annuity Companies

- _ Life insurance and annuity companies
- _ Employee Pension providers
- _ Health, medical, and dental insurance
- _ Disability insurer
- _ Automobile insurance
- _ Homeowners insurance
- _ Umbrella insurance

Notify Utility Companies

- _ Electric
- _ Gas or propane
- _ Water
- _ Sewer
- _ Alarm company
- _ Cable
- _ Phone
- _ Internet

Tax Documents

A Military Survivor who is missing the W2 for the active duty deceased military member for the current tax year (or prior) can simply order it via mail, fax, or email for Deceased Active Duty W2 (Not the Survivor's W-2 or Retiree 1099-R) via:

Phone: 1-800-321-1080
Fax: 1-317-275-0353
Email: www. DFAS.BEAN.JFL.MBX.AMPO-CASUALTY@dfas.mil

Receiving your 1099-R tax forms from Defense Finance and Accounting Service (DFAS):

- *myPay* – Log into https://mypay.dfas.mil. Access your 1099-R from the main menu: by clicking on the: tax statement 1099-R". View, print and save your tax statement. If you have trouble reading the graphic version, click on the "text version" link. Military retirees also have access to the current year's tax statement and the five years prior.
- *Call DFAS* – A DFAS customer care representative can be reached at 1-800-321-1080. Customer Service hours are Monday through Friday 8 am – 5 pm EST