

# Courtesy of REACTA...The Passing of a Retired Employee: Notifications

When a CTA retiree passes away, **it is a necessary responsibility** of the spouse/relatives to immediately notify ALL relevant groups/organizations. Notify CTA, the Trusts and REACTA immediately or they will not be aware. Below please find information REACTA hopes will support you in the process of making contacts.

## **Notify the following organizations (as applicable) of your loved one's death:**

- **The California Teachers Association:** Call Burlingame at 650-697-1400 and ask for Human Resources or use the contact information on the back of this document for specific contacts.
- **CTA Employee's Health Trust (Zenith American Solutions)** at 888-243-2325 and **CTA Retirement Trust** at 833-265-2277.
- **The Social Security Administration:** If the deceased was receiving Social Security benefits, please call 1-800-772-1213. You can also go online at <https://www.ssa.gov>.
- **The State Teachers Retirement Service:** If the deceased was previously a teacher in CA and is receiving STRS payments, call 800-228-5453 or go to [CalSTRS.com](http://CalSTRS.com), google "death" and fill out the notification of death form. You will need the following information to report the death of a CalSTRS member or benefit recipient: their full name, SS# (or CalSTRS Client ID Number,) Date of birth, and Date of death. An informant would need to provide: their full name, relationship to the deceased, mailing address, primary phone number, or mail address.
- **Veterans Administration ([www.va.gov](http://www.va.gov)):** If the deceased was a Veteran, call the Department of Veterans Affairs' at 1-800-827-1000. Follow the phone prompts to reach a Veterans Service representative to notify the VA of your spouse's death.
- **REACTA:** Please call or email President Robin Rose at 818-433-2778 or [rrmcrose@gmail.com](mailto:rrmcrose@gmail.com).

You will need the death certificate for the following which usually takes about two (2) weeks to acquire.

- **Life insurance companies:** Notify any life insurance companies the deceased may have had. You will need policy numbers. For a Life Insurance policy through CTA, see the back of this document.

Name(s) \_\_\_\_\_

Name(s) \_\_\_\_\_

- **Banks, financial institutions:** Notify any financial institutions. It is best if you have a list of the account numbers, and if possible, any online passwords.

Name(s)/Account Info \_\_\_\_\_

Name(s)/Account Info \_\_\_\_\_

- **Financial advisers, stockbrokers:** Notify any financial consultants the deceased may have had.

Financial Consultant(s)/Contact info \_\_\_\_\_

Financial Consultant(s)/Contact info \_\_\_\_\_

- **Credit agencies:** It is a good idea to send copies of the death certificate to the three major firms: Equifax, Experian, and TransUnion to help prevent identity theft.

## **Other Things to Do**

Cancel driver's license and close credit card accounts.

Terminate or update insurance policies including car insurance, AAA towing, etc.

Close email accounts. Close or memorialize Facebook and delete social media accounts.

Seek legal advice as needed on timing of closures.

## Courtesy of REACTA... The Passing of a Retired Employee:

### CTA Notifications

REACTA recommends you make a call rather than use the website to assure the information is passed on and your questions are answered. The website is primarily for your information.

#### Health Insurance and Claims Questions

CTA Employee's Health Trust Administrators: Zenith American Solutions

CTA number Toll Free: 888-243-2325; Fax: 650-331-3920

Email: [CATeachersEnroll@zenith-american.com](mailto:CATeachersEnroll@zenith-american.com)

[www.zenith-american.com](http://www.zenith-american.com)

Anthem Blue Cross-Group # 1800-RU (Medicare) or #1800-RT (Non-Medicare)

800-282-4993

[www.anthem.com/ca](http://www.anthem.com/ca)

Express Scripts (Prescription Coverage for Blue Cross Subscribers only) Group # CTARX333

800-501-7162

[www.express-scripts.com](http://www.express-scripts.com)

Kaiser HMO - Kaiser North - Group # 00437-01

Kaiser HMO - Kaiser South - Group # 101895-01

800-464-4000

[www.kp.org](http://www.kp.org)

Delta Dental – Group # 07158-02301

888-335-8227

[www.deltadental.com](http://www.deltadental.com)

Vision Service Plan (VSP) – Group # 12309884

800-622-7444

[www.vsp.com](http://www.vsp.com)

#### Pension/Retirement

BeneSys Administrators

833-265-2277

[www.CTApension.org](http://www.CTApension.org)

#### Life Insurance

The Standard – Group # 503034

800-522-0406

At CTA, call Jasmine Wan @ [jwan@cta.org](mailto:jwan@cta.org) or call 650-552-5371

#### Medicare

1-800-MEDICARE (1-800-633-4227)

<https://www.medicare.gov/talk-to-someone>