

AUST
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CHECKLIST FOR DEATH IN FAMILY

1220 East Livingston Street 1 Orlando, FL 328031 Phone 407.447.5399 1 Fax 407.447.5861 1 www.austlaw.biz
Obtain original Will from safe deposit box, fireproof safe or county court

_____ Check for paid Funeral Home/Crematorium service documents

_____ Contact Funeral Home/Crematorium to set-up burial/cremation and services

_____ Notify relatives, friends, neighbors, employer and co-workers

_____ Contact a Probate Attorney to begin the Probate process (if no probate is necessary, file Original Will in county court probate division within 10 days of death)

_____ Obtain Death Certificates (this is usually handled by funeral home) and request at least TEN Certified copies of 5 short form and 5 long form (depends on how many financial and insurance institutions will need it)

Obtain all deeds for real estate

_____ Apply for Widowed Person's Exemption, if applicable

_____ Apply for Homestead & Disability Exemption, if applicable

Obtain all titles for vehicles

_____ Continue to pay auto insurance until sold or transferred

_____ Notify Insurance Companies (Life Insurance, Auto, Homeowners, Medical, Health, Disability, Travel, Accident, etc.) of death (may require a Certified Death Certificate)

Notify all retirement/pension income providers

_____ Social Security, if applicable (Funeral home may do this)

Notify Banks and Credit Unions of death (most will accept a copy of Death Certificate) for checking, savings, CD's, etc.

_____ Cancel automatic debits/withdrawals from accounts

Notify Investment Brokers

_____ Change ownership of joint or solely owned stocks

IRA and Retirement Accounts

_____ Transfer Bonds, Mutual or other Funds

_____ Apply for benefits, if applicable for survivors

_____ Social Security Survivors Benefits

_____ Veteran's Burial, including American Flag

_____ Veteran's Survivors Benefits

_____ Pension Benefits

_____ Workmen's Compensation Benefits

_____ Civil Service/Railroad Retirement Benefits

_____ Notify Accountant or Tax Consultant and obtain most recent copy of tax filing

_____ Notify all credit card companies (cancel if only in deceased name)

_____ Notify Landlord, if rental

_____ Continue to pay electric & water bills until home cleaned, sold or transferred

_____ Compile a list of creditors with amounts due and addresses for Probate Attorney to contact. DO NOT PAY any bills until speaking with an attorney.

_____ Cancel Voter Registration and Driver's License

_____ Send thank you notes for flowers, memorials, food, etc.

_____ Review and revise your Will or Trust

SOCIAL SECURITY BENEFITS

Social Security Benefits are not paid automatically. An individual must apply for the benefits. Before applying, collect the following documents, but additional documents may be needed:

- Death Certificate
- Decedent's Social Security Card
- Marriage Certificate /Proof of termination of marriage
- Decedent's Birth Certificate
- Applicant's Birth Certificate
- Minor children's Social Security Number and Birth Certificate
- Proof of disabled child (over age 18)
- Copy of funeral bill
- Record of Decedent's income or most recent W-2 Statement
- Name of bank and account number so benefits can be deposited

** Birth and Death Certificates, Marriage Certificates/Divorce decrees must be originals or certified copies*

VETERAN BENEFITS

When applying for Veteran's Benefits, the following documents will be needed:

- Veteran's Death Certificate
- Veteran's Discharge papers
- Veteran's Marriage Certificate/Divorce decree
- Birth Certificate of Veteran's children
- Receipt of Veteran's funeral bill, itemized
- Veteran's Social Security Number
- Government life insurance policy

Veteran Benefits Contact Information:

Social Security Administration	(800) 772-1213	www.ssa.gov or www.socialsecurity.gov
Veterans Administration	(800) 827-1000	www.va.gov
American Legion	(317) 630-1200	www.legion.org
Veterans of Foreign War	(816) 756-3990	www.vfw.org
AARP	(888) 687-2277	www.aarp.org
IRS	(800) 829-1040	www.irs.gov