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www.vba.va.gov/VBA



Social Security Administration
1(800) 772-1213
www.ssa.gov/pgm/links_survivor.htm



Steven O. Jay, C.P.A.
7055 West Bell Road, Suite 12
Glendale, AZ 85308

Steven O. Jay, C.P.A.
Charles Carrillo
Phone (623)979-1200
Fax (623)979-1201
Cell (602)799-0468
charles@stevenojaycpa.com

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Timothy W. Holt J.D., CFPTM
Attorney-at-Law
7075 W. Bell Rd., Suite 1
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Office (623)334-6800
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What do I do Now?



The death or impending death of a loved is an emotional time. The following information may help you be better informed and organized when addressing some of the decisions you may be asked to make when attending to tasks related to the death of a loved one.

Survivor's Checklist

A checklist to help you after the loss of a loved one.

Immediately following the death, you should:

1. Contact the funeral home.
2. Contact minister.
3. Alert immediate family members and close friends.
4. If employed, contact the deceased's employer.
5. If applicable, notify agent under Power of Attorney.
6. Alert the executor of your loved one's Will.
7. Notify religious, fraternal, and civic organizations in which your loved one was a member.
8. Notify your attorney regarding the probate of the estate.
9. Arrange for the care of any dependents.
10. If the deceased had any pets, arrange for their immediate care.
11. Remove any valuables from the deceased's home, secure the residence, and take steps to make the home appear to be occupied (for example, use of lamp timers).
12. Arrange for the disposal of any perishables left in the deceased's home-such as food, refrigerated items, and existing refuse.

13. Alert the Post Office to forward the deceased's mail.
14. Locate loved one's important documents:

- Will
- Birth certificate
- Social Security card
- Marriage license
- Military discharge papers (DD-214)
- Deed to burial property
- Copy of funeral prearrangements
- Life insurance policies

15. Compile the following information that the funeral home will need in order to finalize the death certificate:

- Deceased's First, Middle, and Last Name
- Deceased's Maiden Name (if applicable)
- Deceased's Home Address
- Deceased's Social Security Number
- Deceased's Date of Birth
- Deceased's Date of Death
- Deceased's Age
- Deceased's Gender
- Race/Ethnicity
- Marital Status
- Spouse's First and Last Name
- Deceased's Highest Level of Education Attained
- Deceased's Occupation
- Deceased's Place of Birth (City and State)
- Deceased's Father's Name
- Birth City
- Birth State
- Deceased's Mother's Maiden Name
- Birth City
- Birth State

Within one month of the death, you should:

1. Consult with an attorney about probate.
2. Meet with an accountant to discuss estate taxes.
3. File claims with life insurance companies.
4. Contact Social Security Administration and other government offices that may have been making payments to the decedent. If the decedent was your spouse, inquire about your eligibility for new benefits.
5. Notify the Registrar of Voters.
6. If the deceased's home is unoccupied, cancel unnecessary home services, such as newspaper delivery, cable service, etc.
7. Cancel deceased's prescriptions.
8. Contact the Department of Motor Vehicles to cancel deceased's driver's license and transfer titles of all registered vehicles.
9. If your loved one was a veteran inquire about benefits that you may be entitled to through the VA.
10. Contact the deceased's employer. Inquire about any 401(k), pension, or company benefits that the decedent may be entitled to.
11. Notify all 3 credit reporting agencies.
12. Obtain a current copy of the deceased's credit report.
13. If the death was accidental, verify whether benefits are available on existing insurance policies.
14. Check for any life insurance benefits available through existing credit card or loan accounts.
15. File any outstanding claims for health insurance or Medicare benefits.
16. Obtain copies of deceased's outstanding bills.

17. Locate and/or obtain other important paperwork of the deceased that will be necessary for the settlement of their estate:

- Copies of the certified death certificate
- Real estate deeds and titles
- Stock certificates
- Real estate titles
- Loan paperwork
- Bank and retirement account statements
- Last 4 years of tax returns

18. Advise all creditors in writing that a death has occurred.
19. Change ownership of assets and lines of credit.
20. Update your Will.
21. Update beneficiaries on your life insurance policies, if necessary.
22. Send acknowledgement cards for flowers, donations, food, or any significant gestures of kindness. Also, remember to thank pallbearers.
23. Organize and distribute decedent's personal belongings.
24. Remove loved one from marketing and mailing lists.

You may be asked to make decisions or perform tasks that are not included in this checklist.

Notes: _____

