



# REMEMBER BOOKLET

A FAMILY  
SUPPORT  
RESOURCE



# TIME SENSITIVE FIRST STEPS



## Step 1:

**Prioritize the tasks** that are time sensitive, and consider who you can enlist for some assistance.



## Step 2:

**Locate identification cards** such as social security, drivers license, passport, birth certificate, and credit cards.



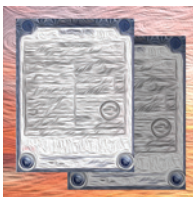
## Step 3:

**Locate will and important documents** such as life insurance policies, bank and credit card statements, check books, income tax returns, and the decedent's calendar and address book.



## Step 4:

**Locate keys** to all properties, vehicles, storage and safety deposit boxes.



## Step 5:

**Request at least 12 certified death certificates** from the funeral home. It is easier and less expensive to get more than you might need at the time of death.



## Step 6:

**Forward** the decedent's cell and land line calls.

# INDIVIDUALS

## CHECKLIST

**Employer**

The employer will advise the family of any benefits available to the family.

**Landlord**

Locate the lease agreement to determine the estate's liability and the terms for vacating the property.

**Neighbors and long-distance friends**

**Personal service providers**

Such as lawn service, housekeeping, veterinarian.

**Pet care arrangements**

**Physicians and health care providers**

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# FINANCIAL INSTITUTIONS

## CHECKLIST

**Credit Report**

Obtain a recent credit report to identify all creditors, and locate all blank checks.

NOTE: Credit reports do not include checking or savings account information.

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**Credit Bureaus**

**Experian:** 888-397-3742

**Equifax:** 800-525-6285

**TransUnion:** 800-680-7289

**PROMPTLY NOTIFY AT LEAST ONE** of the three nationwide credit bureaus, who will notify the other two.

Request that every account be listed as “Closed – Account Holder Deceased”.

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**Credit Card Accounts**

Determine if any terms/conditions allow for a cancellation of debt upon death of the cardholder.

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**Banks**

You should notify banks as soon as possible. You will need the original death certificate, the will if there is one, and a legal document listing who has the authority to make decisions.

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# FINANCIAL INSTITUTIONS

## CHECKLIST

- Financial/Investment Advisor**

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- Retirement/Pension Plan Administrator**

If the decedent is receiving benefits.

Determine if there are survivor benefits.

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- Loyalty Programs from Banks/Credit Cards**

Determine if there are any reward program points that can be redeemed.

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- Open an estate bank account**

If appropriate.

All estate monies are to be deposited and all distributions to be made from estate bank account.

NOTE: "Estate monies" include all money and assets owned by a person at the time of their death.

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# INSURANCE

## CHECKLIST

Search for recurring payments to insurance providers, noting that some may be paid annually, quarterly, or monthly.

**Life Insurance**

Identify all policies and benefits. Examples include individually-owned life insurance, employer group life, Accidental Death through a bank or credit card, mortgage life insurance, travel accident through a credit card.

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**Health and Dental Insurers**

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**Vehicle Insurer**

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**Other Insurance**

Such as Identify Theft Coverage.

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**Remove the decedent's name as a beneficiary on any insurance policies or accounts belonging to another family member**

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# GOVERNMENT AGENCIES

## CHECKLIST

Promptly notifying these agencies will help prevent any type of fraud or identity theft such as the opening of accounts in the name of the decedent.

**U.S. Postal Service**

Determine if mail needs to be forwarded.

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**Social Security Administration (SSA)**  
**800-772-1213**

Confirm the funeral home has notified the SSA. If not, locate the social security number and notify the SSA immediately. They will place the decedent on the Social Security Master Death Index.

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**[usa.gov/report-a-death](https://www.usa.gov/report-a-death)**

A comprehensive list (with links) of agencies to notify when someone dies.

NOTE: You will need the social security number and certified copies of the death certificate for most agencies and programs.

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# PERSONAL ACCOUNTS

## CHECKLIST

Use banking and credit card statements to identify auto-payments and recurring payments that need to be canceled.

**Cell Phone Provider**

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**Email Accounts**

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**Social Media Accounts**

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**Website/Online Shopping Accounts**

Many of these accounts have saved the decedent's credit card information, so cancel as soon as possible.

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# PERSONAL ACCOUNTS

## CHECKLIST

Use banking and credit card statements to identify auto-payments and recurring payments that need to be canceled.

**Memberships**

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**Fraternal and Civic Organizations**

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**Subscriptions**

Online and Paper  
Newspapers, Magazines,  
etc.

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**Reminder:** Always make a note of the name of the person with whom you spoke, their phone number and date of conversation.

# MISCELLANEOUS

## CHECKLIST

**Make a list of all debts**

All estate monies are to be deposited and all distributions to be made from estate bank account.

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**Determine what documentation third parties require in order to deal with the assets held in the decedent's name**

Confirm requirements in all jurisdictions.

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**Remove from Direct Marketing Lists**

A "Deceased Do Not Contact" registration form is available online at [DMAChoice.org](http://DMAChoice.org) (Direct Marketing Association). This action will ensure that pre-approved credit lines are not created and mailed to the decedent.

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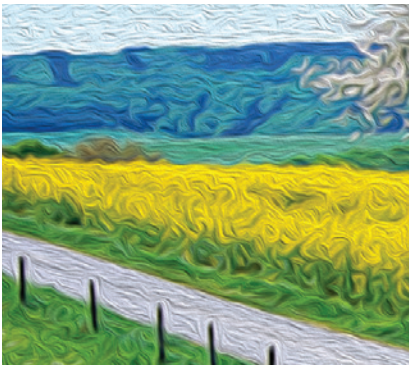
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# NOTES

RECORD NAME AND PHONE NUMBER OF PERSON YOU SPEAK TO

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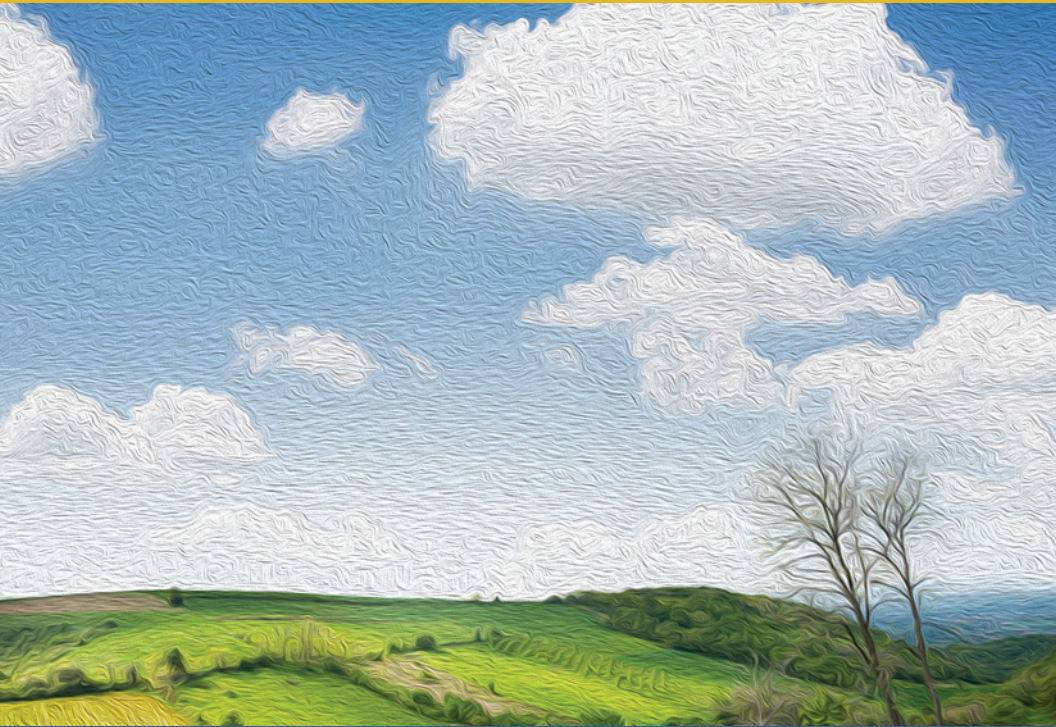
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**REMEMBER...** we are here to help.

US - 03/2025 V1



[everestfuneral.com](https://www.everestfuneral.com)