

# CorsoCare Hospice Bereavement Program

## Survivor's Checklist

Many of these items can be completed by someone close to you that you trust, so don't be afraid to ask for help.

Keep a notebook handy for reminders and instructions you may receive. You may also want to consult an attorney to help you go over the will, if there is one, and to properly divide assets.

### Immediately

**Notify your family and friends**

**Notify your employer of your absence**

**Locate key documents: \*Use a simple accordion file that is easy to transport\***

- Will – determine your loved one's wishes
- Social Security Card, Driver's license, and/or other ID card
- Marriage Certificate and Birth Certificate
- Insurance policies (home, health, auto, etc.)

Life Insurance: Contact them ASAP.

They can coordinate with the funeral home to cover any funeral expenses.

- Deeds and titles to property
- Automobile title and registration papers
- Stock certificates
- Honorable discharge papers for a veteran and/or VA claim member
- Recent income tax forms and W-2 forms
- Mortgage loan information
- Monthly bills, checkbook, and credit cards (check wallet)

**Make funeral arrangements and immediately choose a funeral home if one has not been specified.**

### Within One Month

**Obtain death certificate (at least ten copies) from the funeral home**

**Contact the Social Security office and notify them of your loved one's passing**

- There is a one-time death benefit to surviving spouses of \$255.00.

**Contact the Division of Motor Vehicles**

- Cancel license and voter registration (which is tied to DMV) to avoid identity theft.

Monitor credit report to check for identity theft

**Car registration and title – switch to survivor's name.**

## Within One Month (cont'd)

### Insurances

- Gather all policies (health, home, auto, etc.)
- Change beneficiaries (if needed)

**Make a list of monthly bills and transfer them to survivor's name**

### Contact all banks

- Joint accounts: Ask bank if you have to lose joint account and open individual account.
- Close the deceased's individual accounts
- Check auto-draft bill payments and mark certain they are switched to the survivor.

### Subscriptions and online accounts

- Cancel or change name
- Attend to email, close online accounts, and attend to social media accounts (if applicable).

**Cancel upcoming appointments, events, and trips scheduled for your loved one**

## Within Nine Months

**File tax return for the deceased**

**Ensure your own estate planning is taken care of**