PFCU
Credit Union

Survivors Checklist

This information should be kept with important papers to be used following a loved ones passing

IMMEDIATE

- ☐ Obtain a death certification (at least 12 copies). Is an autopsy necessary?
- ☐ First 24 hours: Organ Donation? Check for signed authorizations and arrange immediately
- ☐ Inventory safe deposit boxes and personal papers of the deceased. Look for any organ donation authorization, burial insurance policies, prepaid mortuary, or cremation society plan
- ☐ Contact mortuary to make funeral and burial or cremation arrangements
- ☐ Arrange obituary notice
- ☐ Contact deceased's employer/business partners
- ☐ Contact friend, relatives, religious organizations, doctor and your advisor
- ☐ Make arrangements for pets/dependents, if any
- ☐ Cancel regular elder services, if any (Meals on Wheels, mail perscriptions, etc.)
- ☐ Secure deceased's home and remove valuables

WITHIN THE NEXT 30 DAYS

- ☐ If applicable notify:
  - ☐ Social Security Administration to stop checks
  - ☐ Department of Health Services if deceased was receiving Medicaid
  - ☐ Veterans Administration
  - ☐ Payers of any pensions or annuities
  - ☐ DMV/Secretary of State
  - ☐ All three credit reporting agencies
  - ☐ Post office to forward mail
- ☐ Locate documents such as a Will, Trust, Insurance Policies, and Deeds to real estate
  - ☐ For a trust, contact the successor trustee
  - ☐ For life insurance, contact the agent
  - ☐ For investment accounts, contact advisor on each
- ☐ Executor begins to process the Will by calling attorney for probate process and filing or original Will with the County Clerk within 30 days

WITHIN THE NEXT 60 DAYS

- ☐ Notify any creditors and utility companies
- ☐ Transfer title on jointly held accounts

IMPORTANT CONTACT INFORMATION

- ☐ Department of Veteran Affairs 800-827-1000
- ☐ Social Security Administration 800-772-1213
- ☐ Credit Reporting Agencies
    - ☐ Equifax 888-378-4329
    - ☐ Transunion 800-888-4213
    - ☐ Experian 888-397-3742

ADDITIONAL SUGGESTIONS

- ☐ Financial Institutions
    - ☐ Notify banks and other financial institutions of the death
    - ☐ Close or transfer ownership of accounts as needed
- ☐ Insurance Policies
    - ☐ Contact all insurance companies (home, health, auto) to notify them of the death and make necessary changes
- ☐ Digital Accounts and Social Media
    - ☐ Secure and manage the deceased’s online presence (email, social media, subscriptions)
- ☐ Professional Services
    - ☐ If applicable, notify the deceased’s lawyer, accountant and any other professional service providers
- ☐ Subscriptions and Memberships
    - ☐ Cancel any subscriptions or memberships in the deceased’s name

PFCU is here to help. Schedule time to meet with a Member Service Representative or schedule an appointment with PFCU Financial Planning to help you navigate through this time.

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