Sol Levinson & Bros., Inc.

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Family Follow-Up Checklist

Below you will find a list of institutions you may need to notify in order to finalize various personal matters.

- ☐ 1. Send acknowledgement cards for memorial donations or shiva packages
- ☐ 2. Transfer all real estate properties
- ☐ 3. Notify insurance companies and file claims, if applicable:

  - Life Insurance
  - Medical Insurance
  - Disability Insurance
  - Travel and Accident Insurance
  - Homeowners' Insurance
  - Automobile Insurance

- ☐ 4. Retirement benefits
- ☐ 5. Social Security Retirement benefits (1-800-772-1213)
- ☐ 6. Veteran's burial, survivor, and monument benefits (1-800-827-1000)
- ☐ 7. Pension benefits
- ☐ 8. Workers Compensation benefits
- ☐ 9. Notify accountant/tax preparer (unless attorney is filing tax returns). Provide:

  - Certified copy of Death Certificate
  - Previously filed tax return forms
  - Current earnings and dividend statements

- ☐ 10. Notify stockbroker, and change ownership of joint or solely owned stocks
- ☐ 11. Check on IRA and retirement accounts
- ☐ 12. Transfer bonds
- ☐ 13. Notify Banks
- ☐ 14. Change all jointly held accounts and correct tax identification numbers (usually Social Security numbers)
- ☐ 15. Cancel direct deposit retirement payments
- ☐ 16. Re-establish title to safe deposit box

- ☐ 17. Re-establish all outstanding mortgages and personal notes
- ☐ 18. Notify Motor Vehicle Administration to transfer titles of all registered vehicles, mobile homes, and boats registered in the decedent's name
- ☐ 19. Notify all credit card companies -- cancel all individually held cards of decedent, and remove decedent's name as an authorized user of any other cards.
- ☐ 20. Apply for credit card life insurance coverage, if applicable
- ☐ 21. Cancel voter's registration
- ☐ 22. Cancel Driver's License
- ☐ 23. If there is an estate, you may need to contact an attorney