

## After a Death

### *A practical guide for the days and weeks ahead*

*This handout provides a checklist to help you organize the many tasks that need to be done after a death. You may also want to read “When a Loved One Dies in the Hospital.” That handout gives answers to common questions about what happens in the hospital after a death. Read it online at <https://healthonline.washington.edu> (use the search word “grief”).*

### In the Days Ahead

Patient and Family Advisors at UW Medicine have found this checklist useful when handling the affairs of someone who has died. We hope this checklist will also help you.

This list does not include all of the tasks that may need to be done. Please think about asking a lawyer for guidance, as each situation is different.



*There are many tasks that must be done after a loved one dies.*

#### **Get copies of the death certificate.**

The funeral home or cremation service will order copies of the death certificate for you. Or, you can buy copies from the King County Vital Statistics Department. Call 206.837.0719 or visit their website at [www.kingcounty.gov/healthservices/health/vitalstats.aspx](http://www.kingcounty.gov/healthservices/health/vitalstats.aspx).

You will most likely need many copies of the death certificate, so that you can send a certified copy to transfer ownership of each major asset. This may include cars, homes, land, or bank accounts. You may also need certified copies for life insurance, veteran’s survivor benefits, and Social Security. To keep costs down, ask these offices if they will accept a non-certified photocopy instead of a certified copy that you will need to buy.

#### **Find out if there is a will.**

If there is a will, contact the Personal Representative named in the will. This person is responsible for taking care of the deceased’s estate and for following the terms of the will.

#### **Find the papers you will need.**

- Marriage certificate, domestic partnership registration, or divorce documents

- Birth certificate
- Social Security card
- Military service papers, including discharge papers
- Will (original copy)
- Property list
- Insurance policies
- Employer benefits or retirement benefits
- Driver's license, passport, citizenship, immigration, or alien registration papers
- Financial account numbers
- Safe deposit box information (and key)
- Investment statements
- Credit and debit card numbers and companies
- Vehicle registration and titles
- Funeral contracts, if prepaid
- Notify the Social Security Administration ([www.ssa.gov](http://www.ssa.gov) or 800.772.1213).**

When you talk with Social Security, you will need:

- A copy of the death certificate
- Social Security number of the deceased
- Proof of your relationship to the deceased, such as marriage or birth certificate

Also ask about the one-time death benefit payment.

Date you made the call: \_\_\_\_\_

Name of person you spoke with: \_\_\_\_\_

Notes: \_\_\_\_\_

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- If the deceased is a veteran, notify the Veterans Administration ([www.va.gov](http://www.va.gov) or 800.827.1000).**

Date you made the call: \_\_\_\_\_

Name of person you spoke with: \_\_\_\_\_

Notes: \_\_\_\_\_

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- Notify the deceased's employer, union, or any other group or professional organization they may have been a member of.** Many of these organizations have insurance policies. Most likely you will need to provide a copy of the death certificate.
- Notify all utility companies (phone, gas, electricity, etc.).**

Name of company: \_\_\_\_\_

Date you made the call: \_\_\_\_\_

Name of person you spoke with: \_\_\_\_\_

Notes: \_\_\_\_\_

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Name of company: \_\_\_\_\_

Date you made the call: \_\_\_\_\_

Name of person you spoke with: \_\_\_\_\_

Notes: \_\_\_\_\_

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Name of company: \_\_\_\_\_

Date you made the call: \_\_\_\_\_

Name of person you spoke with: \_\_\_\_\_

Notes: \_\_\_\_\_

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- Find passwords and transfer online accounts.** Be sure to note if there are any automatic payment plans for monthly bills, such as electric, heating, phone, cell phones, water, sewer, garbage, home mortgage, car loan, etc.

Notes: \_\_\_\_\_  
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- Contact the post office with forwarding information.**

Date you made the call: \_\_\_\_\_  
Name of person you spoke with: \_\_\_\_\_  
Notes: \_\_\_\_\_  
\_\_\_\_\_

- Stop delivery of newspapers and magazines.**

Name of company: \_\_\_\_\_  
Date you made the call: \_\_\_\_\_  
Name of person you spoke with: \_\_\_\_\_  
Notes: \_\_\_\_\_  
\_\_\_\_\_

Name of company: \_\_\_\_\_  
Date you made the call: \_\_\_\_\_  
Name of person you spoke with: \_\_\_\_\_  
Notes: \_\_\_\_\_  
\_\_\_\_\_

- Cancel home-care services such as meal delivery or nursing services.**

Name of company: \_\_\_\_\_  
Date you made the call: \_\_\_\_\_  
Name of person you spoke with: \_\_\_\_\_  
Notes: \_\_\_\_\_  
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Name of company: \_\_\_\_\_

Date you made the call: \_\_\_\_\_

Name of person you spoke with: \_\_\_\_\_

Notes: \_\_\_\_\_

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**Cancel services that are no longer needed, such as cell phone, internet, and cable TV.**

Name of company: \_\_\_\_\_

Date you made the call: \_\_\_\_\_

Name of person you spoke with: \_\_\_\_\_

Notes: \_\_\_\_\_

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Name of company: \_\_\_\_\_

Date you made the call: \_\_\_\_\_

Name of person you spoke with: \_\_\_\_\_

Notes: \_\_\_\_\_

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**Contact the major credit bureaus to help avoid possible identity theft:**

Equifax – *www.equifax.com*

Experian – *www.experian.com*

TransUnion – *www.transunion.com*

Name of company: \_\_\_\_\_

Date you made the call: \_\_\_\_\_

Name of person you spoke with: \_\_\_\_\_

Notes: \_\_\_\_\_

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Name of company: \_\_\_\_\_

Date you made the call: \_\_\_\_\_

Name of person you spoke with: \_\_\_\_\_

Notes: \_\_\_\_\_

Name of company: \_\_\_\_\_

Date you made the call: \_\_\_\_\_

Name of person you spoke with: \_\_\_\_\_

Notes: \_\_\_\_\_

- Notify all insurance companies.** Most likely, you will need to send a certified copy of the death certificate to each company.

**Life insurance:** \_\_\_\_\_

Date you made the call: \_\_\_\_\_

Name of person you spoke with: \_\_\_\_\_

Notes: \_\_\_\_\_

**Employer's or pension insurance:** \_\_\_\_\_

Date you made the call: \_\_\_\_\_

Name of person you spoke with: \_\_\_\_\_

Notes: \_\_\_\_\_

**Funeral insurance or other death-related benefit plans:**

\_\_\_\_\_

Date you made the call: \_\_\_\_\_

Name of person you spoke with: \_\_\_\_\_

Notes: \_\_\_\_\_

**Mortgage and/or credit insurance:** \_\_\_\_\_

Date you made the call: \_\_\_\_\_

Name of person you spoke with: \_\_\_\_\_

Notes: \_\_\_\_\_

**Credit card insurance:** \_\_\_\_\_

Date you made the call: \_\_\_\_\_

Name of person you spoke with: \_\_\_\_\_

Notes: \_\_\_\_\_

\_\_\_\_\_

**Health insurance (including Medicare, Medicaid, Medigap, private), dental insurance, and long-term care:**

Name of company: \_\_\_\_\_

Date you made the call: \_\_\_\_\_

Name of person you spoke with: \_\_\_\_\_

Notes: \_\_\_\_\_

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\_\_\_\_\_

Name of company: \_\_\_\_\_

Date you made the call: \_\_\_\_\_

Name of person you spoke with: \_\_\_\_\_

Notes: \_\_\_\_\_

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**Property insurance:** \_\_\_\_\_

Date you made the call: \_\_\_\_\_

Name of person you spoke with: \_\_\_\_\_

Notes: \_\_\_\_\_

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**Worker's compensation insurance:** \_\_\_\_\_

Date you made the call: \_\_\_\_\_

Name of person you spoke with: \_\_\_\_\_

Notes: \_\_\_\_\_

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**Contact banks and investment firms.**

**Savings accounts or CDs:** \_\_\_\_\_

Date you made the call: \_\_\_\_\_

Name of person you spoke with: \_\_\_\_\_

Notes: \_\_\_\_\_

\_\_\_\_\_

**Checking account:** \_\_\_\_\_

Date you made the call: \_\_\_\_\_

Name of person you spoke with: \_\_\_\_\_

Notes: \_\_\_\_\_

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**Debit card:** \_\_\_\_\_

Date you made the call: \_\_\_\_\_

Name of person you spoke with: \_\_\_\_\_

Notes: \_\_\_\_\_

\_\_\_\_\_

**Safe deposit box:** \_\_\_\_\_

Date you made the call: \_\_\_\_\_

Name of person you spoke with: \_\_\_\_\_

Notes: \_\_\_\_\_

\_\_\_\_\_

**Retirement accounts (IRA, 401-K, etc.):** \_\_\_\_\_

Date you made the call: \_\_\_\_\_

Name of person you spoke with: \_\_\_\_\_

Notes: \_\_\_\_\_

\_\_\_\_\_

**Stocks and bonds:** \_\_\_\_\_

Date you made the call: \_\_\_\_\_

Name of person you spoke with: \_\_\_\_\_

Notes: \_\_\_\_\_

\_\_\_\_\_

**Other investments and brokerage accounts:** \_\_\_\_\_

Date you made the call: \_\_\_\_\_

Name of person you spoke with: \_\_\_\_\_

Notes: \_\_\_\_\_

\_\_\_\_\_

**Contact credit card companies.**

**Card name and number:** \_\_\_\_\_

Date you made the call: \_\_\_\_\_

Name of person you spoke with: \_\_\_\_\_

Notes: \_\_\_\_\_

**Card name and number:** \_\_\_\_\_

Date you made the call: \_\_\_\_\_

Name of person you spoke with: \_\_\_\_\_

Notes: \_\_\_\_\_

**Card name and number:** \_\_\_\_\_

Date you made the call: \_\_\_\_\_

Name of person you spoke with: \_\_\_\_\_

Notes: \_\_\_\_\_

**Transfer ownership of deeds and titles.**

Property deeds

Mortgage documents and loan notes

Vehicle titles and registrations (for car, boat, RV, and others). Get forms from state offices.

Department of Licensing

Membership certificates

**Other:** \_\_\_\_\_

Notes: \_\_\_\_\_

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**Other:** \_\_\_\_\_

Notes: \_\_\_\_\_

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### **In the Coming Weeks and Months**

- File all required tax forms.** The IRS has a free booklet called “Tax Information for Survivors and Executors and Administrators,” publication 559.
- Accept support for your grief.** Help is available through individual counseling, support groups, bereavement books, websites, and especially from family and friends. People want to reach out to you – please accept their support and love.
- Be gentle with yourself.** The death of a loved one is one of the most powerful events we go through in life. Grieving takes time, so allow yourself the time you need to adapt to this major life change. It may help to read the booklet called “Guide through Grief,” which you can find at <https://healthonline.washington.edu> (use the search word “grief”).

#### **Questions?**

Your questions are important. Please call us if you have questions or concerns.

UWMC Social Work and Care Coordination:

Montlake Campus:  
206.598.4370

Northwest Campus:  
206.668.1304

HMC Social Work:  
206.744.8030

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#### ***Late Fragment***

*And did you get what  
you wanted from this life, even so?*

*I did.*

*And what did you want?*

*To call myself beloved, to feel myself  
beloved on the earth.*

*- Raymond Carver*

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