

# BENEFICIARY Support CHECKLIST




For more  
details, scan  
the QR code



## WE ARE HERE TO HELP DURING THIS DIFFICULT TIME.

Losing a loved one is never easy, and taking the next steps can feel overwhelming. We're here to offer a helping hand and gently remind you of some important things to consider in the days ahead.

VITAL DOCUMENTS	FINANCIAL MATTERS TO CONSIDER	CONTACT FOR BENEFITS & INSURANCE	DIGITAL & MISC.
<input type="checkbox"/> Certified Death Certificate (10-15 copies)	<input type="checkbox"/> Bank/Credit Union Accounts, Safe Deposit Boxes	<input type="checkbox"/> Life/Prearranged Funeral/ Credit Life/Annuity Insurance Company(s)	<input type="checkbox"/> Pet/Dependent Care
<input type="checkbox"/> Last Will & Testament	<input type="checkbox"/> Credit Card Accounts	<input type="checkbox"/> Update the beneficiary designations on own policies	<input type="checkbox"/> Contact Landlord and/or Utility Companies
<input type="checkbox"/> Trust Documents	<input type="checkbox"/> Pension/Retirement Accounts	<input type="checkbox"/> Health Insurance Provider (locate card for info)	<input type="checkbox"/> Consider Cell Phone
<input type="checkbox"/> Estate Paperwork (contact attorney if probate required)	<input type="checkbox"/> Investment Accounts (contact financial advisor if applicable)	<input type="checkbox"/> Medicare/Medicaid	<input type="checkbox"/> Online/Auto Bill Pay
<input type="checkbox"/> Social Security Card	<input type="checkbox"/> Outstanding Debt (mortgage, loans, bills)	<input type="checkbox"/> Social Security Administration	<input type="checkbox"/> Cancel/Update Memberships & Subscriptions
<input type="checkbox"/> Marriage and/or Birth Certificate (dependents)	<input type="checkbox"/> File Final Tax Returns	<input type="checkbox"/> Veterans Affairs (VA)	<input type="checkbox"/> Forward Mail (USPS)
<input type="checkbox"/> Real Estate Documents (deeds and/or leases)	<input type="checkbox"/> Check for Unclaimed Property or Benefits	<input type="checkbox"/> Current/Former Employer (final paycheck, group life insurance, retirement benefits)	<input type="checkbox"/> Update/Terminate Email Account(s)
<input type="checkbox"/> Vehicle(s) Title/Registration	<input type="checkbox"/> Secure Any Valuables	<input type="checkbox"/> Homeowner/Rental/Auto Insurance Company(s)	<input type="checkbox"/> Close Social Media Account(s)
<input type="checkbox"/> Court Documents (e.g. court orders, divorce decree)			<input type="checkbox"/> Consider grief support or counseling for family