

POST FUNERAL CHECK LIST

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Veterans:

- You may be able to get assistance with the funeral, burial plot, or other benefits. For information on benefits call the Veterans Administration at 800-827-1000. You will need a copy of your loved one's discharge papers. DD214

Social Security: (SEE ATTACHED INFORMATION)

- If your loved one was receiving Social Security benefits, notify your local Social Security office 1-800-772-1213, 1947 E. SR 60, Valrico of the death, since these benefits will stop. Overpayments will result in a difficult process of repayment. If you are a surviving spouse, ask about your eligibility for increased benefits. Also, check on benefits that any minor children may be entitled to receive.

Insurance:

- Contact the Health Insurance Company or employer regarding terminating coverage for the deceased while continuing coverage for others covered through the policy.
- Contact the life insurance company for all life insurance policies. You will need to provide the policy number and a certified copy of the death certificate and fill out a claim form. If the deceased is listed as the beneficiary on any other policy, arrange to have the name changed/removed.

Employer:

- If the deceased was working, contact the employer for information on pension plans, credit unions and union death benefits. You will need a certified copy of the death certificate for each claim.

Credit Cards:

- Return credit cards of the deceased with a certified copy of the death certificate, or notify the credit card company if you, as the survivor, want to retain use of the card.

Tax Returns:

- Seek the advice of an accountant or tax advisor about filing the deceased's tax return for the year of the death. Keep monthly bank statements on all individual and joint accounts that show the account balance on the day of death, since you will need this information for the estate tax return.

Banking:

- Arrange to change any joint bank accounts into your name. If the deceased's estate is in trust, check with the Trust Department or Customer Service at the bank. Don't forget the Safety Deposit Box if you have one.

Automobiles:

- If the deceased owned a car, transfer the automobile title into your name at the Department of Motor Vehicles, or if the estate is probated, through Probate Court.

Stocks/Bonds:

- Arrange to change stocks and bonds into your name. Your bank or stockbroker will have the forms.

Bills:

Make sure that bills, such as mortgage payments, continue to be paid. Notify all creditors or vendors of the death to have the name changed. (mortgage company, electric, gas, phone, water, lawn service, etc)

Obituaries:

Currently the Tampa Bay Times is offering Hillsborough County funeral homes a free 50 line obituary (20 characters per line) plus a photo. Obituaries must be submitted to the funeral home Monday thru Thursday by 11 am the day prior to the run date. Weekend runs (Saturday or Sunday) obituaries must be submitted to the funeral home by 11 am Friday. Photos must be submitted in JPEG format. They can be sent to bcfinc@verizon.net. Please call to confirm receipt of the obituary.

Documents you may need to complete the tasks above:

- Certified Death Certificates (1 for each insurance policy with cause of death, banks, creditors will need 1 without cause of death (some companies **may** make a photo copy themselves and return certified copy back to you)
- Social Security Card
- Marriage Certificate
- Birth Certificate, (Birth Certificate for each child, if applicable)
- Insurance Policies
- Deed and Titles to Property
- Stock Certificates
- Bank Books
- Honorable Discharge Papers DD214 for a Veteran and/or V.A. Claim Number
- Recent Income Tax Forms and W-2 Forms
- Title and Registration Papers for Automobile, Boat, Motor Home, Trailer, etc

Additional Things to do: _____

