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[FREE] Death Notification Checklist: 13 Places to Alert After Someone Dies

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When a loved one passes away, you might be responsible for tying up their financial and legal affairs. If you don't prepare ahead of time, the amount of paperwork may surprise you.

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You don't have to take on the task alone: professionals like CPAs and attorneys will be your best asset as you're settling a loved one's estate. But some tasks, like sending death

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Death notifications are essential, and it's best to send them out as soon as you can. Death notifications tell agencies to place a flag on a loved one's accounts, preventing identity theft. They also ensure that financial agencies correctly manage and distribute assets.

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So how do you send death notifications, and who needs to receive them? Below, we'll provide a free death notification checklist to help you navigate the process.

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What You'll Need to Gather Before You Send a Death Notification

First, let's look at what you'll need to gather before you can begin sending death notifications.

Death certificate

The most important document you need is the [death certificate](#). Make sure to least ten copies of the certificate; you'll need it to close bank accounts, file life insurance claims, and many other things.

Before you can get a death certificate, you'll need a legal pronouncement of death. A hospice nurse or paramedic provides this document if the person dies at home, or a doctor issues it if they die at the hospital.

Will

Ideally, you've spoken with your loved one about their will before they passed away. That way, you know exactly where the document is and who the estate executor is. The executor needs to be involved in sending death notifications and managing other parts of the estate.

If you didn't speak about a will, search for one in the person's desk drawers, filing cabinets, or safe deposit box. You should also check with the person's attorney to see if they have a copy of the will.

Passwords

Making some death notifications is easier if you have access to the person's online passwords. Check around their desk and computer files for a list of passwords.

They may have also used a [password manager app](#), which would be installed on their computer, mobile device, or both. If this is the case, you'll still need to find their "master password," which should be written in the will or other end-of-life planning documents.

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Contacts

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Another helpful piece of information is your loved one's contact list. You might find it in their email account or cell phone, or they might have written the contacts down somewhere.

Look for contacts like old friends, relatives you might not know very well, legal and financial advisors, and the person's employer and co-workers.

Bills and mail

For the weeks following the death, make sure to collect any bills, magazine subscriptions, and important mail that arrives at the person's address.

These will help you understand which parties you need to notify about the death. They can also provide you with the account numbers for credit cards and loans.

Bank account statements

If you can, you should also check the person's bank account statements for charges that occurred after their death.

Doing so will help you identify ongoing subscription services you need to cancel and automatic payments you need to address.

Tip: If you don't have the password for your loved one's online banking portal(s), you'll need to notify the bank and provide a death certificate to obtain this information.

Identification and vital records

Locate and put together these vital records and identifying documents (belonging to the deceased):

- Social Security card
- Birth certificate
- Driver's license
- Passport
- Permanent resident card (green card)
- Tax records

Tip: You don't necessarily need all of these documents to make death notifications, but it's a

good idea to put them together anyway. Gather up what you can find, and then acquire replacements, if necessary, later on.

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Basic and financial information

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You should create a document containing the person's essential identifying information. List the following information about the deceased so that you can reference it later:

- Full legal name, including middle name and maiden name if applicable
- Last two or three known addresses, including their current address
- Social Security number
- Birthdate and death date
- Any account numbers you can identify (credit cards, checking and savings accounts, loans, investment accounts)

Tip: Keep this information secure in a lockbox, [secure online storage](#), or encrypted storage drive.

13 Places to Notify After a Death

When a loved one dies, it's a good idea to notify family and friends quickly. You can send a mass text or email or ask a few loved ones to inform the others. This gets everyone on the same page right away, and it can help wrap up some tasks faster.

For example, the deceased person might have a pet or pets that you'll need to rehome. A family member or friend might volunteer to adopt them. Your relative might even have information about the will or end-of-life plans that you don't.

But relatives and friends are far from the only people you'll need to notify about the death. In addition to your loved ones, you'll need to inform the individuals, entities, and agencies listed below.

1. Attorney

You don't need an attorney to settle an estate and make death notifications, but having one makes things easier. Additionally, your loved one might have already been working with an attorney to manage his or her end-of-life plans.

Contact your loved one's attorney by phone and let them know they passed away. If the person didn't have an attorney, you might want to contact or hire an estate lawyer, depending on the estate's size and complexity.

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2. Employer

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Next, you'll want to call or email your loved one's employer (if he or she was still working). Ask for information regarding benefits, as well as any paychecks that might be due. You should also ask whether there's a company life insurance policy.

3. Social Security Administration (SSA)

Typically, funeral directors report deaths to the Social Security Administration. But ultimately, it's your responsibility to ensure this notification gets made.

You can contact your local SSA office to notify them about the death or check to ensure that the funeral home made the notification.

Tip: The SSA will inform Medicaid about your loved one's death.

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4. United States Postal Service (USPS)

You don't want the deceased person's mail to continue going to an address where new people might be living. To solve this issue, you'll need to [file a request to forward mail at your local USPS office](#).

5. Credit bureaus

[Notifying credit bureaus](#) about your loved one's death is essential in preventing identity theft. The Social Security Administration will eventually do this for you, but it can take up to a year or longer. In that time, identity theft could already cause significant problems.

You only need to notify one of the three bureaus (Experian, [Equifax](#), and TransUnion). Once you tell one, the others will receive the notification, too.

- [How to notify Equifax of a death](#)
- [How to notify TransUnion of a death](#)
- [How to notify Experian of a death](#)

6. Pension agencies
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If the deceased person was receiving a pension, you'll need to notify that agency so that they stop sending monthly checks and send you the necessary claim forms.

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7. Life insurance companies

You'll need copies of the death certificate, in addition to the policy numbers, to claim any policies the deceased person had. The insurance agency will send you the proper claim forms to fill out.

8. Other insurance companies

Contact other insurance agencies (like health insurance, homeowners insurance, and car insurance) to close those accounts. Let them know the person has died, and ask if they can refund any unused premiums.

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9. Banks and financial institutions

If you have the person's passwords and banking information, closing their accounts will be much easier.

If you don't have that information, you'll need a copy of the death certificate for each bank or institution.

Ensure that the funds are transferred appropriately according to the will and probate law, and keep records of each account you change or close.

To [close out credit card and loan accounts](#), you'll need to work with the estate executor to settle outstanding balances.

10. Subscription and membership providers

If you have access to the person's passwords and login information, you won't need to notify most subscription providers about the death. You'll just need to log in to their accounts and cancel their memberships.

However, some subscription services require you to contact them by phone to cancel a membership. And if you don't have the passwords and account information, you'll need to contact each service for directions on canceling the memberships.

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11. Financial advisors and brokers

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Next, contact the deceased person's CPA, as well as any stockbrokers and account managers. If the deceased did not have a CPA, you might want to hire one. The estate might need to file a tax return, which can get complicated.

12. Internal Revenue Service

If you're working with a CPA, they'll help you [notify the IRS about your loved one's death](#). If not, you can do this yourself by sending the IRS a copy of the death certificate.

13. Department of Motor Vehicles (DMV)

You need to notify the DMV so that they remove the deceased person's name from their records. This prevents identity theft.

Contact your local DMV for specific instructions, but keep in mind that you'll need a copy of the death certificate.

Tying Up Loose Ends

We've listed the key people and places you need to notify of a death. But these aren't the only important matters that need to be settled.

To prevent identity theft, you should also delete or memorialize social media accounts, close email accounts, and take care of other aspects of the person's [digital legacy](#). You should keep an eye on bank accounts and credit card accounts until they're completely closed, making sure there are no unexplained charges.

When a loved one dies, you have a lot on your mind and a lot on your plate. But we hope the checklist provided here will help make the process of tying up a loved one's legacy a bit easier.

Sources:

1. "What to do when a loved one dies." *Consumer Reports*. October 2012.
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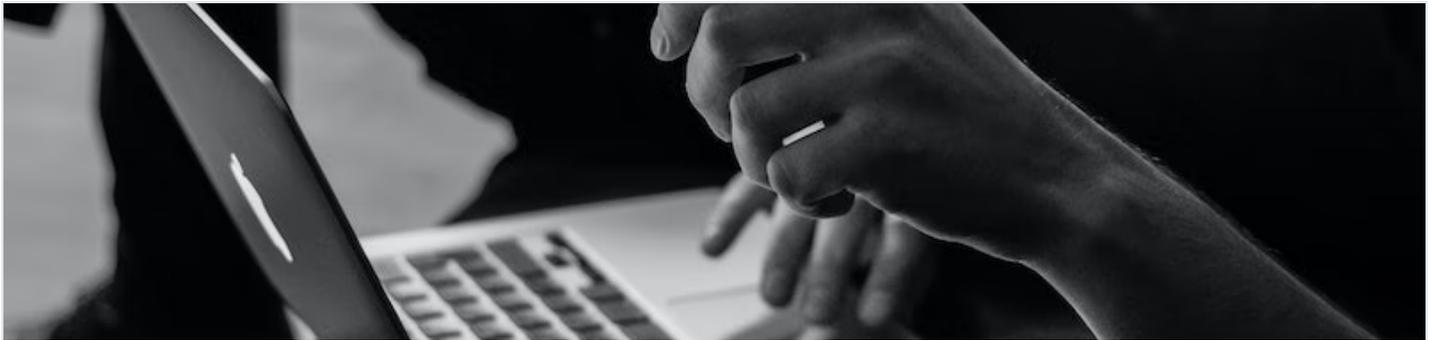
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