# Who to notify

United States

Three boxes against each: told them, sent the certificate they asked for, heard back. The third is the one that matters, and it is the one people forget to chase.

Do not do this in one sitting. Cross off what does not apply and leave the rest for a day when you can face being on hold.

## Government

- ☐ ☐ ☐ Social Security Administration ____________________
- ☐ ☐ ☐ Medicare or Medicaid ____________________
- ☐ ☐ ☐ Department of Veterans Affairs, if they served ____________________
- ☐ ☐ ☐ The IRS, and the state tax office ____________________
- ☐ ☐ ☐ The DMV, for a driver's licence ____________________
- ☐ ☐ ☐ Voter registration ____________________

## Money

- ☐ ☐ ☐ Each bank and credit union ____________________
- ☐ ☐ ☐ Credit card companies ____________________
- ☐ ☐ ☐ Mortgage lender or landlord ____________________
- ☐ ☐ ☐ Life insurance ____________________
- ☐ ☐ ☐ Health, home and auto insurance ____________________
- ☐ ☐ ☐ Pension, 401(k) or retirement plan ____________________
- ☐ ☐ ☐ Financial adviser or accountant ____________________
- ☐ ☐ ☐ The three credit bureaus ____________________

## Day to day

- ☐ ☐ ☐ Employer ____________________

- ☐ ☐ ☐ Doctor, dentist and any specialist ______
- ☐ ☐ ☐ Utilities: power, water, gas ______
- ☐ ☐ ☐ Phone and internet ______
- ☐ ☐ ☐ Subscriptions and memberships ______
- ☐ ☐ ☐ Place of worship, clubs, unions ______
- ☐ ☐ ☐ Post office, to redirect mail ______

## Anything you have thought of that is not here

- ☐ ☐ ☐ ______
- ☐ ☐ ☐ ______
- ☐ ☐ ☐ ______
- ☐ ☐ ☐ ______

> Telling the credit bureaus stops accounts being opened in their name, which does happen. One of the three passes it to the others, but confirming with each is safer.

> Most of these want a certified copy of the death certificate rather than a photocopy, and some will not discuss the account at all until the estate has been through probate. This sheet is a prompt, not legal advice.