

Death Notification Checklist

It is important to notify government agencies, banks, credit reporting associations, etc. of a death to reduce the risk of identity theft.

We recommend initially contacting the agencies by phone and following up in writing. For most government and financial institutions, you will need the deceased's social security number, a copy of the death certificate and proof that you are an executor of the estate. Be sure to keep copies of all written notices for your records.

We have compiled a list of possible agencies or associations you may have to contact following the death of a loved one. Check in with your director before calling as we typically take care of contacting the Social Security Administration and Veteran's Administration (providing we have the necessary paperwork for the VA).

Government Agencies

- Social Security Administration: (800) 772-1213
- Veteran's Administration
- Defense Finance and Accounting Service: (800) 269-5170 (If deceased was a military retiree receiving benefits)
- Office of Personnel Management: (888) 767-6738 (If deceased was a retired or former *federal* civil service employee)
- U.S. Citizenship and Immigration Service: (800) 375-5283 (If deceased was not a U.S. citizen)
- Department of Motor Vehicles: (If deceased had a driver's license or state ID)

Financial Institutions

- Credit/ merchant card companies
- Banks/ savings and loan associations/ credit unions
- Online bank accounts
- Mortgage companies, lenders
- Financial planners and stockbrokers
- Pension providers

Insurance & Annuity Companies

- Life insurers and annuity companies
- Health/ medical/ dental insurers
- Disability insurer
- Automotive insurer

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- Mutual benefit companies

- Credit Reporting Agencies: Instruct agencies to list all accounts as “Closed. Account Holder is Deceased.” and request a credit report to obtain a list of creditors and view recent credit history
 - Experian: (888) 397-3742. P.O. Box 9701, Allen, TX 75013
 - Equifax: (800) 525-6285. P.O. Box 105069, Atlanta, GA 30348
 - TransUnion: (800) 916-8800. P.O. Box 2000, Chester, PA 19016

- Memberships, Subscriptions & Associations
 - Professional associations and unions
 - Health/ athletic clubs
 - Automobile clubs
 - Public library
 - Alumni clubs
 - Rotary, Kiwanis, Lions, Veterans’, etc. organizations and clubs
 - Newspapers/ magazines
 - Online subscriptions (i.e. video and music streaming services, newspapers)
 - Social Media accounts (Facebook, Twitter, Instagram, etc.)
 - Email accounts
 - Blogging Accounts

Do Not Contact List

For \$1.00, you can put the deceased’s name on the “Deceased Do Not Contact” list of the Direct Marketing Association: <http://ims-dm.com/cgi/ddnc>

Other

- Attorney
- Accountant
- Employers: check with Human Resources about outstanding compensation and if surviving dependents are eligible for benefits
- Utilities
- Forward mail at Post-Office
- File the final tax return

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