MissionSquare

Loss of a Loved One

At-a-Glance Beneficiary Support Checklist



Gather Important Papers and Information:

- ☐ Death certificate
- ☐ Will and any trust documents
- ☐ Funeral wishes
- ☐ Birth certificates, including any dependent children
- ☐ Social Security numbers including surviving spouse, dependent children, beneficiaries
- ☐ Driver's license or state ID, passport, Medicare documents, military service record, or state ID other personal identification documents
- ☐ Insurance policy paperwork (life, health, home, car, etc.)
- ☐ Beneficiary information for financial accounts and insurance
- ☐ Military service record and discharge papers
- ☐ Marriage certificate
- ☐ Divorce and/or child support documents
- ☐ Real estate deeds
- ☐ Mortgage and other loan statements
- ☐ Bank statements
- ☐ Credit card account numbers and statements
- ☐ Most recent tax returns/tax records
- ☐ Retirement account statements
- ☐ Investment-related statements (for stocks, bonds, etc.)
- ☐ Vehicle records (titles, loan documents)

Notify Organizations:

- ☐ Contact the probate or circuit court where your loved one resided to submit the will to probate.
- ☐ Notify the Social Security Administration: (800) 772-1213; **www.ssa.gov**
- ☐ Contact the employer and health insurance company. Ask about benefits and (if needed) continuing employer-offered health benefits for surviving family members.
- ☐ For private health insurance, contact the insurance company to remove your loved one from a family policy or cancel the policy.
- ☐ Contact the post office for any changes in address, and cancel subscriptions.
- ☐ Reach out to the Department of Motor Vehicles in your loved one's state

Notify Lenders and Change Titles/Ownership:

- ☐ Bank account(s)
- ☐ Credit card(s)
- ☐ Home(s)
- ☐ Car(s)
- ☐ Safe deposit box(es)
- ☐ Investment and brokerage accounts

Notify Credit Bureaus:

- ☐ Credit bureaus to contact:
  - Equifax: (800) 685-1111; **www.equifax.com**
  - Experian: (888) 397-3742; **www.experian.com**
  - TransUnion: (800) 888-4213; **www.transunion.com**

Apply for Benefits:

- ☐ Social Security survivor benefits
- ☐ Pension plan and other retirement benefits
- ☐ Other employee benefits
- ☐ Life insurance proceeds
- ☐ Military-related veteran's benefits

Cancel Utilities, Memberships, and Subscriptions:

- ☐ Utilities and cellphone service
- ☐ Magazine, streaming, and other subscriptions
- ☐ Clubs and other groups with membership fees
- ☐ Transition email addresses, social media accounts, and websites. Review each provider's policy for removing, memorializing, or transferring these services.

Consider Your Finances:

- ☐ Review your finances after applying for survivor benefits.
- ☐ Make sure your beneficiary information is up to date.

Have questions? We are here to help.

Resources:

Beneficiary Support Guide
Distribution Rules for Inherited Retirement Plan Assets
Rules When Inheriting an IRA as a Beneficiary
Inheriting a 403(b) Plan: What to Do & How It Works
Federal Trade Commission Funeral Planning Tips

MissionSquare Plan Services:

(800) 669-7400
Monday–Friday
8:30 a.m.–9 p.m. ET