



What to Do when I Die (The Short List)

This list contains information about the things that need to be done when _____ dies.

If there is an online version of this information (such as Everplans.com), add that information here:

- An online version of this list is in _____.
 - _____ has access to those files.
1. Report the Death / Request Cremation
 2. Notify Emergency Contacts (friends and family)
 3. Notify sources of Income (ask to report a death)
 - Social Security
 - Veteran's Administration
 - Pension and other sources of monthly deposits
 4. Notify Immigration Office if the deceased is a Temporary or Permanent Resident of Mexico
 5. Apply for Life Insurance proceeds
 6. Apply for survivor benefits for Social Security, VA or Pensions (if available)
 7. Make sure bills are being paid
 - Rent / Mortgage
 - Utilities (phone, internet, electric, gas, condo fees, etc.)
 - Credit Card accounts
 8. Notify Financial Accounts
 - Bank and Investment Accounts
 - Credit Card Accounts
 9. Take the Will to the Attorney or Notaria. They will assist with handling of
 - Real Estate
 - Vehicles
 - Personal Property if specified in the will
 10. Close Online Accounts (social media) as needed
 11. Check on any Website maintained by the deceased, close as needed
 12. Cancel or change any US Mailing Service