

AFTER LOSS CHECKLIST

Here are the first five steps to take within a few weeks of someone passing away.

Contact the Social Security Office

Your funeral director may have already done this for you, so call and confirm if they did or not. If not, you'll want to contact social security yourself. If a spouse has passed, I would urge you to make an appointment with social security, as your income could change.

Through Social Security, you may be able to apply for survivor benefits. Visit [the Social Security website](#) to learn more about their process and find any forms that you may be required to fill out.

Social Security Office Phone: 1.800.772.1213

Notify Banks or Mortgage companies and take the death certificate to the bank.

Reach out to any Financial Advisors and make them aware of your loss. Contact your accountant about filing as a widow(er).

Notify Life Insurance. File claims and update beneficiaries.

Order a headstone. Since headstones are rarely ready in time for burial, you can save this task until after the burial has taken place. This also helps ensure you are thinking a bit more clearly before making a purchase.

If you need more information, reach out and I'm happy to answer any questions you may have.

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