

# *Adair Funeral Homes*

## *Important Information to Remember*

1. File Insurance claims for each policy held. Contact each company for a claim form. You will need a certified death certificate for this.
2. File appropriate health insurance claims and notify them of the death that has occurred.
3. Notify your home, business and auto insurance.
4. Contact Social Security at 1-800-772-1213 about benefits, appropriate forms and procedures.
5. Contact Veteran's Administration, if applicable. Ask them about benefits, appropriate forms and procedures.
6. Talk with your attorney about probating the Will and making other necessary filings.
7. Make arrangements to update your Will or Trust, if necessary.
8. Transfer assets into your name or your Trust, as appropriate.
9. Revise titles on your car(s) or other titled property.
10. Contact your bank(s) for revising or closing out checking/savings accounts and safe deposit boxes.
11. Correct the tax identification number on financial accounts that are in the name of the deceased.
12. Cancel direct deposit payments that are in the name of the deceased.
13. Change beneficiaries on insurance policies, retirement accounts, savings bonds, etc.
14. Contact creditors for all mortgages, personal notes, credit cards, etc. in which the name of the deceased is involved.
15. Change ownership of joint or solely owned stocks and bonds.
16. Transfer or close IRA and other retirement accounts or investments managed by brokers.
17. If your income will change significantly, you should make a plan for paying debts and obligations.

The information above is provided by Adair Funeral Homes to serve as a guideline to assist you in the upcoming days and weeks. This information is not intended to be all inclusive, and should not replace appropriate legal or financial counsel.