

For additional information and contact details for specific organizations in the San Francisco Bay Area, visit WhenYourLovedOneDies.com

✓	Item	Comments	Notes
	Section 1: Immediate actions		
	Meet with staff at the mortuary, funeral home (or equivalent)	They will tell you what needs to be done. If you have already set up a plan or package with them, make sure to bring all of the existing documentation.	
	Order extra death certificates	Can usually be done through the mortuary. Recommendation: order more copies than you think you need. Some people/organizations will accept photocopies or faxes, but many require originals. After you receive originals, scan one and save it as a PDF, so you will have it available to email to anyone who needs it (assuming they will accept a copy).	
	Contact the attorney who manages trusts/accounts	Attorney will need to send you a letter of engagement for handling the trust/will/etc. process, and will want at least 1 copy of the death certificate for their files. Recommendation: call as soon as possible to notify your attorney, who may or may not want to meet with you immediately (some may want to get the letter done first).	
	Contact tax accountant	Taxes are filed jointly through the calendar year in which the deceased spouse was still alive (so for a spouse who dies during 2022, you will file 2022 taxes jointly in 2023). If it's close to the time to file taxes, make sure your tax accountant can help you as soon as possible. If it's not tax season, you have more flexibility. If you pay estimated taxes on a quarterly basis, you may need to re-evaluate the amount since your income level will change, and your tax accountant can help you determine that.	

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	Coordinate equipment pick-up	If the deceased was at home or in hospice care and required a special bed, equipment, etc. Hospice agencies will come to pick up equipment right away. If you rented equipment, you will need to make arrangements through the rental company.	
	Return items to hospital	If the deceased was taken home from the hospital and brought gowns, blankets, etc. It's not necessary to wash items before you return them, as they will run them through the hospital laundry anyway.	
	Arrange for a house appraisal	May be necessary if the house is held in trust, as the trust must be re-valued per the date of death. While this does not need to be done immediately, it should be done as soon as practical, as the appraiser needs to work backward to calculate the information for the appropriate date, and the attorney handling the trust/estate will need the information. May need to plan on a 1-2 week lead-time (for the appointment), then 1-2 weeks for the report.	
	Write and submit obituary or notice		
	Identify any organizations donations may be made to in memory of the deceased		
	If the deceased lived alone	Immediate actions to take at their place of residence: lock the home, throw out or distribute any food, water plants, remove valuables, arrange care for pets, forward mail.	
	Cancel any in-home services no longer needed	Examples: Meals on Wheels or other meal delivery services, "Friendly visitor" programs, in-home nursing or physical therapy visits.	

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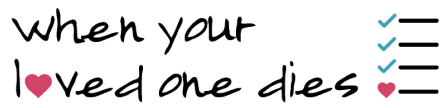
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	Cancel any upcoming travel plans	Cancel flights, car rental reservations, hotels, etc.	
	Section 2: Notifications		
	Social Security	1-800-772-1213. Website: How Social Security Can Help You When a Family Member Dies	
	Medicare	Social Security will notify Medicare.	
	AARP	1-888-980-9483 Website: How to notify AARP about a deceased member	
	Medical insurance		
	Life Insurance	Contact Life Insurance company. You will need to complete forms, and send them with a death certificate and original life insurance policy (if available). Forms need to be completed by each beneficiary.	
	Insurance (car, property or renter, health, dental, long-term care, business, liability, etc.)	Contact insurance agent to change names on policies or close as necessary.	
	Investment organizations	<i>See WYLOD website for additional contact information.</i>	
	DMV	If the deceased had a driver's license. Of course, if you do nothing, it will eventually expire, but the DMV rolls are used for other purposes (mailings, jury duty, etc.).	
	Election board	Notify the appropriate county to get the person off of the list for voter information. <i>See WYLOD website for SF Bay Area contact information.</i>	

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	Doctors, Physical Therapy clinics, etc.	Notify any doctors who the deceased was seeing, as they will need to update their files. Make sure to cancel any future appointments.	
	Veterans Administration Benefit	1-800-827-1000 Website: Information for dependents or survivors about benefits	
	CalPERS	888-225-7377 or Notify CalPERS of Death	
Section 3: Billing and purchases			
	Identify a list of all accounts in the deceased's name	For each account, determine whether to close or transfer to surviving partner's name (or another family member). For some bills, if they are already in both names (husband and wife), and one is removed from the account, it can be very simple. If the account is only in the deceased's name, there may be more work involved, as they could require closing that account and opening a new account in the surviving spouse's name.	
	For any accounts on auto-pay, determine whether to stop or transfer to another person's checking account or credit card		
	Credit cards (Visa, MasterCard, stores, etc.)		
	Utilities: gas, electric, water, water softener, garbage	<i>See WYLOD website for SF Bay Area contact information.</i>	
	Publications: newspapers, magazines	<i>See WYLOD website for SF Bay Area contact information.</i>	



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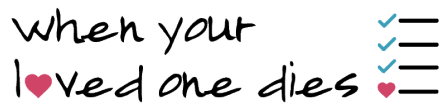
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	Phone - landline	If not canceling immediately, consider changing voicemail message. Also, consider forwarding their number to someone else's number.	
	Phone - cell/mobile	If not canceling immediately, consider changing voicemail message. Also, consider forwarding their number to someone else's number.	
	Streaming services (Netflix, Amazon Prime, Hulu, HBO, etc.)		
	Internet service provider		
	Membership stores (Costco, Sam's Club, etc.)		
	Membership to any fitness facility, health club, or gym	Many of these facilities require 1 month's notice to cancel a membership, so be sure to ask if this can be waived to avoid paying for an extra month.	
	AAA or another roadside service		
Section 4: Other accounts			
	Identify media subscriptions that need name change (magazines, newspapers, etc.)	Some will let you call and change the name over the phone. Sometimes it depends on whether the original subscription was in both names or just one. <i>See WYLOD website for SF Bay Area contact information.</i>	

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	Identify subscriptions that should be canceled	Many will not give partial refunds, just be sure not to renew when they expire or consider transferring the subscription to someone else in the family who would like to receive the remaining issues.	
	Identify memberships that should be canceled	Professional or service organizations, medically-related organizations (per the deceased's medical situation, such as a group of people with the same condition).	
	Identify bank/investment accounts that need name change, or need to have an additional signer added (such as an adult child)	Bank accounts held in trust may not be changed, but other accounts may be possible to add another signer (if surviving spouse needs help managing financial items). Recommendation: don't remove the deceased's name from bank accounts immediately, as it's possible that checks could still come in with their name, etc. and you want to be able to deposit them.	
	Safe Deposit Box	Confirm who has access, and when renewal fees are due. If only the surviving spouse is on the account, it might make sense to add another person who can have access.	
	Notify all 3 credit reporting agencies so the account is flagged	This is optional, as eventually they will be notified anyway, but it can take a couple of months for the info to pass through the system. The risk is that someone may try to fraudulently open new accounts in the name of the deceased. For this reason, it can be a good idea to run a final credit history in a few months, to be sure nothing sneaks in. <i>See WYLOD website for additional contact information.</i>	
	Run credit history in 2 months		



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	Create labels to put on mail that can be returned.	If the deceased continues to receive mail (such as donation solicitations or catalogs), you can put a sticker on it, put it back in the mailbox, and it will be returned with instructions to remove the name from their mailing list. Sample text: "RETURN TO SENDER: ADDRESSEE DECEASED, please remove from your mailing list."	
	Section 5: Technology		
	Make a list of all logins/passwords	Keep track of this list as you may need to log in to check status, or somehow make changes on behalf of the deceased (see below re: social media).	
	Post a notice on the deceased's social media accounts		
	Contact any people connected to the deceased on Facebook, LinkedIn, or any other social networks, that need to be notified		
	Shut down social media accounts	<i>See WYLOD website for social media platform information.</i>	
	Determine if any emails or mailing lists that go to the deceased should be changed to go to the surviving partner or another family member.	In either case, respond to the emails and tell the sender whether to remove or change the addressee, or just unsubscribe.	

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	Monitor email account	Keep an eye on emails. Don't shut down the account, as some emails may continue to come there and you don't want to miss them (such as for auto-billing, reminders, etc.). Then as items come in, you can figure out what to do with them (notify, cancel, unsubscribe, etc.). Also, if you later discover that the deceased had an online account for something, the "lost password" link will usually send the reminder or reset info to the email account on file.	
Section 6: Items to donate or sell (<i>see WYLOD website for websites to sell or give away items</i>)			
	Clothing	Depending on the item, you can donate to Goodwill, Salvation Army, the Discovery Shop, or another local thrift/resale store.	
	Eyeglasses	Lions Club runs a large glasses recycling program. They take donations of used glasses at any Walmart Store that has a Vision Center, Lens Crafters, and America's Best. OneSight also distributes used prescription glasses around the world. Donations can be dropped off at Sears Optical or Pearle Vision centers.	
	Walkers, transport chair, canes, other equipment	Check with local Senior Centers, as many have "donation closets" for these items. There are also local organizations who collect, repair, refurbish, and redistribute gently used medical equipment and unused home health care supplies. <i>See WYLOD website for SF Bay Area contact information.</i>	

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	Other personal items related to hobbies or interests (sports equipment, musical instruments, art supplies, etc.)	Depending on the item, you can donate to Goodwill, Salvation Army, the Discovery Shop, or another local thrift/resale store. Some items may be useful to schools or non-profit organizations supporting children or families.	
	Items to sell	For any items you wish to sell (such as through eBay or another online marketplace), take photos, write descriptions, determine asking price. <i>See WYLOD website for additional contact information.</i>	
Section 7: Thanks and gratitude			
	Cash or thank-you gifts for anyone who helped with caregiving, as appropriate		
	Yelp or other online reviews for anyone who helped that might have a service which is reviewed	Including home care or hospice care organizations.	
	Thank you feedback to medical staff, as appropriate	<i>See WYLOD website for SF Bay Area contact information.</i>	
	Send thank you notes for donations	Tip: buy thank you cards that are specifically for this situation, as they will have some text inside which is appropriate, and that will save you a bit of writing.	