



FAMILY FOLLOW-UP CHECKLIST

Insurances/Claims

- ☐ Life Insurance
- ☐ Health and Medical Insurances (Vision, Dental) and Accidental Insurance
- ☐ Loans (Vehicle, Student)
- ☐ Mortgage/Homeowners Insurance
- ☐ Change Survivors Beneficiary on Remaining Accounts
- ☐ Workers' Compensation

Deeds, Titles, and Promissory Notes

- ☐ Home Titles
- ☐ Property Deeds
- ☐ Vehicle Titles, Recreational Vehicle Titles

Banking

- ☐ Notify Banks, Close Accounts
- ☐ Change Jointly-Held Account Ownership
- ☐ Cancel Direct Withdrawal and Deposit Transactions
- ☐ Safety Deposit Box
- ☐ Certificates of Deposit

Financial Advisor/Stockbroker

- ☐ IRA/Retirement Accounts
- ☐ Change Ownership of Jointly-Owned Stock
- ☐ Transfer Bonds, Mutual Funds, Trusts, etc.

Other Financial Records/Accountant

- ☐ Income Tax Returns
- ☐ Property Tax Records
- ☐ Business Interests Held
- ☐ Investment Records

Legal Papers/Attorney

- ☐ Wills and/or Trusts
- ☐ Estate Administration
- ☐ Probate Processing, if applicable

Benefits

- ☐ Social Security Survivor Benefits
Bozeman Office: (833) 452-0419, or www.ssa.gov
- ☐ Veterans Burial and Survivor Benefits
- ☐ Employment Benefits
- ☐ Retirement, Pension, and Annuities
- ☐ Disability Payments

Accounts/Memberships

- ☐ Credit Cards
- ☐ Utilities (Electricity, Water, Cell Phone, Cable/Satellite)
- ☐ Organizational Memberships (Fraternity/Sorority, Eagles/Elks, Masonic)
- ☐ Email & Online Memberships (Streaming Services, Ancestry, etc.)
- ☐ Election Board
- ☐ Credit Reporting Agencies (Equifax, Experian, TransUnion)