

Checklist

for Surviving Spouse

This is a short checklist of things to help you over the next few months as you cope with the loss of your spouse. Please don't hesitate to call us if you have any questions that arise between now and our meeting.

Focus First on You're Family and the Grieving Process

The business can wait until you and your family have had ample time to help cope with your loss.

Contact the Social Security Administration

The funeral home will make an initial contact, but it is up to you to call 800-772-1213 or visit your [local Social Security office](#).

Notify your Spouse's Pension Provider

This is to obtain benefits due to you as a beneficiary. They will provide the correct claim forms.

Check with the Veteran's Administration

If your spouse served in the military, you may be [eligible for benefits](#).

Notify Life & Health Insurance Companies.

Ask for links or hard copies of claim forms and instructions. The sooner you start, the sooner you'll receive benefits.

Important: Wait to contact Your Bank and Local Insurance Agency

You may need to deposit some checks after your spouse has died, and banks might not let you do that after they have been informed. Also, we suggest waiting on notifying your homeowner's and car insurance agent until we have met.

Arrange to Meet with Your Financial Advisor

You can also discuss changes in the short term, such as a budget, and long term, including your retirement plan and cashing out investments.

Everything else can wait until we meet. Please bring a couple copies of your spouse's death certificate with you. Understand, as hard as this time is - this is why you did an estate plan.