FINANCIAL SENSE®
Wealth Management

Survivor Checklist

Check as Completed

1. Request 10 copies of death certificate (funeral director will assist) ☐
2. Contact employer regarding group insurance and other benefits ☐
3. Contact insurance companies (auto, life, and health) ☐
   Have policy numbers available
4. If deceased was a government retiree or employee, contact Civil Service Personal Management Office (1-888-767-6738) ☐
5. If deceased was retired from the military, contact Defense Finance and Accounting Service (1-800-321-1080) ☐
6. If deceased was a veteran, contact Veterans Administration (1-800-827-1000) ☐
7. Notify Social Security Administration (1-800-772-1213) ☐
   Deceased's Social Security Number: ____________________
   Spouse's Social Security Number: ____________________
8. Check items in safe deposit box ☐
9. Locate Last Will and Testament and Trust documents ☐
10. Notify banks and stock brokerage companies ☐
11. Contact credit card companies and other charge accounts ☐
12. Check on credit life insurance with all creditors ☐
13. Locate personal balance sheet (or similar listing of cash, securities, real-estate, personal effects, mortgages and other liabilities) ☐
14. Locate business disposition agreements (buy/sell, partnership, etc.) ☐
15. Call attorney and arrange for meeting to discuss probate and other matters ☐
16. As time for filing tax returns approaches – call accountant, CPA, or tax preparer ☐

Advisory services offered throught Financial Sense® Advisors, Inc. Registered Investment Advisor • Securities offered through Financial Sense® Securities, Inc. Broker/Dealer, Member FINRA/SIPC • DBA Financial Sense® Wealth Management, Inc.

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