



68 Main St. #3, Kennebunk, ME 04043 Telephone 207-467-3301 Fax 207-467-3305  
PO Box 426, One Canal Plaza, 9<sup>th</sup> Floor, Portland, ME 04112 Phone: 207-774-2635 Fax: 207-871-8026  
[www.mainecenterforelderlaw.com](http://www.mainecenterforelderlaw.com)

## SURVIVOR'S CHECKLIST

We are sorry for your family's loss. When you are ready, please contact us to schedule an appointment to review the next step. In the meanwhile, we've compiled a list of items that you can begin to address. We look forward to assisting you. To schedule your appointment, please contact Holly Rowe at [hrowe@perkinsthompson.com](mailto:hrowe@perkinsthompson.com) or 207-400-8190.

1. Schedule an appointment with our office and compile a list of all assets owned by the decedent and any beneficiary designations.
2. Schedule an appointment with an accountant to discuss estate and income tax.
3. File claims with life insurance companies.
4. Contact the Social Security Administration and other government offices that may have been making payments to the decedent. If the deceased was your spouse, inquire about eligibility for new benefits.
5. Notify the Register of Voters.
6. Cancel any unnecessary home services, such as newspaper delivery, cable service, etc.
7. Cancel prescriptions.
8. Contact the Bureau of Motor Vehicles to cancel driver's license and possibly transfer title of all registered vehicles. – Transfers may require probate.
9. If your loved one was a veteran, inquire about benefits that you may be entitled to through the VA.
10. Contact the deceased's employer. Inquire about any 401 (K), pension, or company benefits that the decedent may be entitled.
11. Notify all three credit reporting agencies.

12. If the death was accidental, verify whether benefits are available on existing insurance policies.
13. Check for any life insurance benefits available through existing credit card or loan accounts.
14. File any outstanding claims for health insurance or Medicare benefits.
15. Obtain copies of the deceased's outstanding bills.
16. Locate and/or obtain other important paperwork of the deceased that will be necessary for the settlement of their estate:
  - Certified copies of the death certificate
  - Real Estate deeds and titles
  - Stock certificates
  - Loan paperwork
  - Bank and retirement account statements
  - Last 4 years of tax returns
17. Advise all creditors in writing that a death has occurred.
17. Change ownership of assets and lines of credit.
18. Update your Will, considering pre-arrangements for yourself.
19. Update beneficiaries on your life insurance policies, if necessary.
20. Send acknowledgment cards for flowers, donations, food, or any significant gestures of kindness. Also, remember to thank pall bearers.
21. Organize and distribute decedent's personal belongings.
22. Remove loved one from mailing lists.