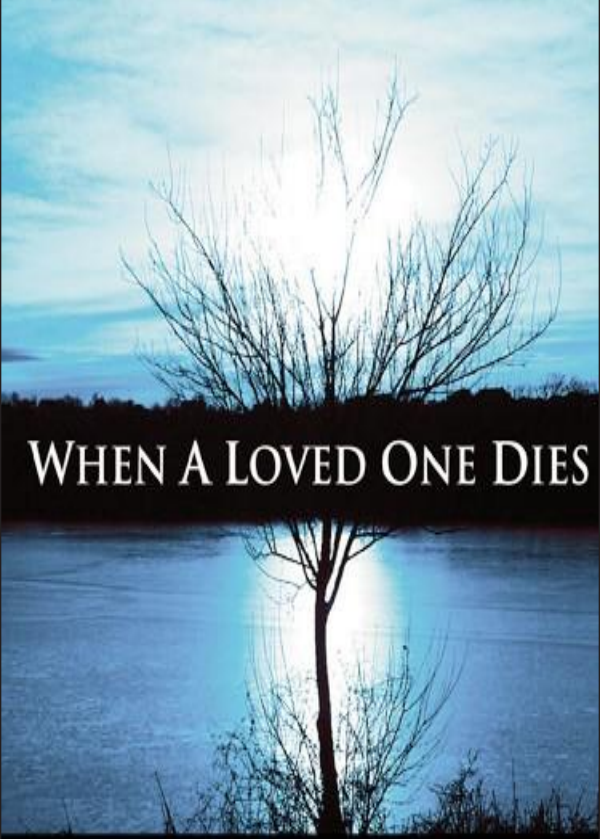


## Checklist

1. **Send acknowledgement cards for flowers, memorial donations, food, and spiritual remembrances**
2. **Transfer of Real Estate**
  - Apply for Widowed Person
  - Exemption
3. **Notify Insurance Companies and File Claims**
  - Life Insurance
  - Medical, Health, Disability, Travel & Accident
  - Retirement Benefits and Annuities
  - Homeowners
  - Car Insurance
  - Change Survivors Benefits
4. **Apply for Appropriate Benefits**
  - Social Security Survivors Benefits
  - Veterans Burial and Survivors Benefits
  - Pension Benefits  
(contact spouse's place of employment)
  - Workmen's Compensation Benefits
  - Civil Service
  - Railroad Retirement
5. **Notify Stockbroker**
  - Change Ownership of Joint or Solely Owned Stock
  - IRA and Retirement Accounts
  - Transfer Bonds
  - Mutual or Other Funds
6. **Notify Bank**
  - Change all Jointly Held Accounts
  - Cancel Direct Deposit Benefits Payment
  - Re-establish Safe Deposit Box
  - Re-establish all outstanding Mortgages, Personal Notes, etc.
  - Apply for Credit Life Insurance which may exist on loans, credit cards and mortgages
  - Certificates of deposit
  - IRA
7. **Notify Department of Motor Vehicles**
  - Transfer titles of all Registered Vehicles
  - Cancel Driver's License
  - Cancel voters Registration
8. **Notify all Credit Card Companies**
  - Change all Jointly Held Accounts
  - Cancel Direct Deposit Benefits Payment
  - Re-establish Safe Deposit Box
9. **Notify Attorney/Accountant/Tax Consultant**
  - If a will must be probated
  - If your will needs to be revised
  - For income tax purposes
10. **Advanced Planning/Pre-Arrangement**
  - You may consider planning in advance
  - Pre-arranging a funeral can be very helpful for many families
  - It's an effective way to put your wishes in writing



**WHEN A LOVED ONE DIES**

Rev. Tom Davis  
Director of Elder Care Ministry  
tdavis@germantownumc.org  
901-758-6513

Yolanda Toney  
Director of Congregational Care  
ytoney@germantownumc.org  
901-758-6508

## **Social Security Burial Allowances/Benefits**

**Visit [www.ssa.gov](http://www.ssa.gov) for more information.**

It is possible that you may be entitled to burial allowances provided by the Social Security Administration. To inquire about these benefits, call 1-800-772-1213. A one-time payment is payable to the surviving spouse if he or she was living with the beneficiary at the time of death, OR if living apart, was eligible for Social Security benefits on the beneficiary's earnings record for the month of death. If there is no surviving spouse, the payment is made to a child who was eligible for benefits on the beneficiary's earnings record in the month of death.

Monthly survivors benefits can be paid to certain family members, including the beneficiary's widow or widower, dependent children and dependent parents.

When you call the Social Security office, please have this information:

- (a) The Social Security number of the deceased wage earner.
- (b) The marriage license or certificate if a surviving spouse is filing the claim.
- (c) A copy of the death certificate is not required. The funeral home is required to furnish this information to the Social Security Administration.

## **Newspaper Notice**

The obituary information is supplied to *The Commercial Appeal* through your funeral home. After you compose the obituary for your loved one, your funeral director will either email or fax this to *The Commercial Appeal*. The newspaper charges a fee for this service, and it is paid through the funeral home.

## **Veterans Burial Allowance**

It is possible that you may be entitled to burial allowances provided by the U.S. Veterans Administration. If you did not assign these allowances to the funeral home at the time that funeral arrangements were made, you may wish to contact this agency to see if benefits are available.

Tennessee Department of Veteran Affairs  
215 Rosa L. Parks Avenue  
Nashville, TN 37243-1010  
(615) 741-2931

## **U.S. Railroad Retirement Board Railroad Retirement Board**

233 Cumberland St.  
Memphis, TN 38112  
(901) 544-3274

## **Certified Copies of Death Certificate**

Your funeral home is responsible for originating and completing all local death certificates. The physician/medical examiner is responsible for signing and stating the cause of death on the certificate. You may want to order several copies of the death certificate that will be needed to file insurance claims and send out notifications of death. There is a fee for additional copies of the death certificate. In some cases, a copy of the death certificate is sufficient.

If you need to order additional certified copies of the death certificate contact:

Memphis & Shelby County Vital Records  
814 Jefferson Ave.  
Memphis, TN 38105  
(901) 544-7608

or

Tennessee Department of Health  
425 5th Avenue North, #5  
Nashville, TN 37243  
(615) 741-7213

## **Memorial or Funeral Services at Germantown United Methodist Church**

Services at the church may be arranged by calling the church office at 754-7216. The Funeral Guild can arrange a reception to receive visitors before or after the service.