



What To Do When Someone Dies Checklist Part One: Paperwork

***Note: This will be an especially hard time.
Don't throw anything away until you feel more focused.
Create a folder in which to keep all papers; make notes so you can stay organized.***

Done/ Date	Task	Notes
	Write Obituary <ul style="list-style-type: none"> ○ Request help or input ○ Send to papers 	
	Documents to gather: <ul style="list-style-type: none"> ○ Death Certificates (12-15 copies) ○ Birth Certificate ○ Marriage Certificate/Divorce papers ○ Military Discharge papers ○ SS# for all dependents ○ Will ○ Tax returns/W-2 forms ○ Stocks, dividends ○ Other 	
	Insurances <ul style="list-style-type: none"> ○ File claims (Life Insurance) ○ Change policyholder name (Home, auto) ○ Change beneficiaries if needed ○ Cancel medical and LTC insurance 	
	Contact Social Security Apply for benefits: 1-800-772-1213	
	Contact Division of Motor Vehicles Cancel license to avoid identity theft, (207) 624-9000	

	<p>House Title – Registry of Deeds Cumberland County- (207) 871-8389 York County- (207) 324-1576</p>	
	<p>Car Registration and Title Contact your town hall</p>	
	<p>Bills Make changes to each individually as needed</p>	
	<p>Order credit report - Monitor for identity theft www.annualcreditreport.com 1- 877-322-8228</p>	
	<p>Subscriptions Cancel or change name</p>	
	<p>Online accounts</p> <ul style="list-style-type: none"> ○ Close or update online accounts ○ Attend to email accounts 	
	<p>Appointments Cancel upcoming appointments, events, trips they had scheduled.</p>	

Helpful Links (please call if you need any information and don't have access to a computer).

- Social Security Administration, Survivors Benefits: <https://www.ssa.gov/benefits/survivors/>
- Healthcare and Elder Law Programs Corporation: <http://www.help4srs.org>
- Maine Legal Services for the Elderly: <http://www.mainelse.org/>
- Maine Vital Records: <https://www.maine.gov/dhhs/mecdc/public-health-systems/data-research/vital-records/order/index.shtml>



Checklist Part Two: Finances

As you notify organizations, always ask about how their death will affect your status, finances, access to information and benefits.

Done/ Date	Task	Notes
	<p>Will</p> <ul style="list-style-type: none"> ○ Contact agent, executor, attorney ○ If none designated, request to be appointed personal representative, if desired contact Registry of Probate ○ York County: (207) 324-1577 ○ Cumberland County: (207)871-8382 	
	<p>Bank Accounts</p> <ul style="list-style-type: none"> ○ Notify banks and ask about bank policy: ○ Must names be changed on joint accounts? ○ Do joint accounts need to be closed? ○ Close individual accounts 	
	<p>Safety Deposit Box</p> <ul style="list-style-type: none"> ○ If your name is not on box, you may request permission for a single transaction authority (i.e. to retrieve will from box) with a court order. ○ Otherwise, must wait until probate is complete. 	
	<p>Credit Cards/Creditors</p> <ul style="list-style-type: none"> ○ Contact probate department ○ Ask if there is credit insurance to cover the debt ○ Ask if there is any additional insurance ○ Ask for written evidence that you are responsible for paying debt on individual accounts 	

	<p>Insurance Companies</p> <ul style="list-style-type: none"> ○ Advise all companies in writing ○ Change beneficiaries if appropriate 	
	<p>Unions, professional associations, fraternal organizations</p> <ul style="list-style-type: none"> ○ Civil service, VA, etc. ○ Notify them of death ○ Ask if there are benefits 	
	<p>Tax professional</p> <ul style="list-style-type: none"> ○ Contact if there are sufficient assets ○ Confirm whether or not estate taxes need to be paid ○ File final income tax return for deceased spouse (this is usually a joint return unless the spouses filed separately) and request an income tax refund on behalf of the deceased spouse if applicable ○ Confirm adjusted Required Minimum Distributions from retirement accounts in order to avoid penalties. 	
	<p>Contact Employer</p> <ul style="list-style-type: none"> ○ Check on benefits, wages, vacation time, retirement plans, deferred compensation, reimbursements ○ Check status of benefits in place for you 	

Helpful Websites

- State of Maine webpage – Contact numbers for probate courts:
<https://www.maineprobate.net/>



Checklist Part Three: Well Being

**Be especially mindful of taking care of yourself while coping with loss.*

**Avoid making major decisions right away - wait until you are really ready.*

**Be vigilant about protecting yourself from scams.*

Done/ Date	Task	Notes
	<p>Contact close friends and family</p> <ul style="list-style-type: none"> ○ Inform them ○ Ask for the specific support you need ○ Stay in touch 	
	<p>Check your benefits</p> <p>Confirm status of your own:</p> <ul style="list-style-type: none"> ○ Health insurance ○ Dental insurance ○ Life insurance ○ Auto & Homeowners 	
	<p>Safety</p> <p>Add security measures to your home to help you feel safer alone</p> <ul style="list-style-type: none"> ○ Timers for lights ○ New locks ○ Security system 	
	<p>Get your papers in order</p> <ul style="list-style-type: none"> ○ Create a will, or update your current one ○ Identify agent for your own health care and financial welfare ○ Complete Advance Directives for Healthcare 	

<i>Continue on Ongoing Basis</i>	Give yourself time to grieve <ul style="list-style-type: none"> ○ Do what you need to do ○ Take care of yourself ○ Let yourself feel ○ Connect with others ○ Get regular health exams Get some exercise ○ Journal ○ Join a grief support group ○ Eat well ○ Rest appropriately 	
----------------------------------	--	--

Helpful Websites

- Information and resources for widows/widowers: <http://www.widownet.org/>
- Maine Advance Directives Forms for download: [Advance Directives Forms | Maine Legal Services for the Elderly \(mainelse.org\)](#)
- Hospice Foundation of America Grief Resource Page: <http://www.hospicefoundation.org/grief>
- HelpGuide.org: http://www.helpguide.org/mental/grief_loss.htm
- Web MD: <http://www.webmd.com/balance/tc/grief-and-grieving-topic-overview>

Family Caregiver Support Program
 The Southern Maine Agency on Aging at the Sam L Cohen Center
 30 Barra Rd, Biddeford Me 04005
 1-800-427-7411 * www.smaaa.org

Updated 11/2022