

## Funeral Choices of Chantilly

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## Old Town Funeral Choices

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## SURVIVOR'S CHECKLIST

The following information may or may not be relevant to your own circumstances. We are providing this list in an attempt to aid you in the settling of your affairs.

Always contact an attorney for assistance in answering legal questions, locating important documents, administering the estate and/or making distributions to beneficiaries

**1. Look** for instructions which the deceased may have left regarding preferences for funeral and burial arrangements. If none, the person who is deemed the legal next of kin by law or designee may make the decisions.

**2. Obtain** an adequate number of certified copies of the Death Certificate for legal purposes. The Funeral Director will obtain these for you. Additional Death Certificates may be obtained from the Health Department in the county where death occurred for five years. After five years, you may reorder certified copies by contacting the Virginia State Health Department at 1-877-572-6333

**3. Notify** your bank

You will need a death certificate to:

Change accounts into your name only or joint accounts

Close existing accounts under the deceased name.

**4. Credit Cards**

Surviving Spouse - Do not immediately remove deceased spouse's name from your credit card accounts. It is suggested a 6 month wait period then open account in your name only..

In some cases, cancel the card in the deceased's name and destroy the card(s)

## 5. Wills

Record the Will with probate court. For estates without a Will, appoint an administrator. You will need a certified death certificate before proceeding. If the deceased is appointed in any capacity in your Will, you will need to remove their name and appoint another person(s). If you have no Will, it is strongly suggested you have one prepared.

## 6. Insurance

Policies: Contact individual companies for necessary paperwork to collect proceeds

### Provide the following information

- A. Policy Number and/or deceased's social security number
- B. Full name of the deceased
- C. Date and cause of death
- D. Inquire if they require a certified death certificate or if a copy will suffice

Check with credit card companies, your mortgage company or credit unions. Some companies supply life insurance or credit insurance.

## 7. Veterans

Contact Veteran's Administration if applicable, for benefits due the surviving spouse. You may need the following items as well as the Veteran's DD214 form or Discharge from military service

- Certified copy of Death Certificate
- Copy of marriage license
- Copy of birth certificates for any dependent children

Your Funeral Director will assist in scheduling burial and/or service in a National Cemetery, if eligible as well as obtain a flag, honor guard, headstone or marker

## 8. Notify deceased's employer (personnel or insurance departments)

- Inquire about group benefits, survivor's benefits, profit sharing, and/or pension monies you may be entitled to
- If deceased carried health insurance for you and/or their children, inquire about continuing the coverage

## 9. Memberships

- Labor Union - Notify and inquire about any survivor benefits
- Fraternal Organizations – Notify and inquire about any survivor benefits

## **10. Request Change of Beneficiary**

IRA

Life Insurance Policies

Pension Plans

401K plans

Any other accounts, investments or retirement plans

## **11. Social Security**

If deceased was receiving benefits, notify your local office of the death, since these benefits will stop

Apply to your local office for any benefits you and/or your minor children are entitled to. **1-800-772-1213**

**12. IF** you have no income or monies due to you presently, seek emergency aid from the Department of Social Services in the county you reside

## **OTHER CONSIDERATONS**

- 1.** Notify friends and family especially if you do not wish to have any type of service.
- 2.** Develop a list of assets of the deceased: inventory household goods, personal belongings so they may be accounted for and properly distributed especially if there is no surviving spouse
- 3.** Collect any debts owed to the deceased
- 4.** Meet with a financial planner
- 5.** Check on credit life insurance that may have been carried on all debts. Close accounts covered by this type of insurance
- 6.** Pay all bills and taxes as soon as possible (funeral expenses, income tax, real estate tax, mortgages, hospital etc.)
- 7.** Compare Explanation of Benefits from health care insurance with hospital, laboratory and doctor bills

**8.** Collect mail and put in a change of address at the local post office(especially if deceased lived alone) Review the mail so Subscriptions may be cancelled. This may also include lawn service, cell phones, home care companies. Etc

**9.** Sign new Will, Durable Power of Attorney, Living Will, Designee for Funeral Plans etc.

**10.** After one month, place an auto-responder on the person's email address. After several months, delete the account. If other electronic accounts such as facebook exist, contact for cancellation procedures.