

Who do I contact?

Immediately following the death of a loved one, a whirlwind of activity must take place. To help you through this confusion, we have prepared a simple checklist for your use.

Social Security Benefits

(your funeral director will notify social security for you, however you must contact them and apply for any benefits if eligible)

No letter is needed for social security to make an appointment simply call (800) 772-1213

Life Insurance Benefits

Each Life insurance company either has an agent that you may contact or an 800 number to call. Simply contact the company, have your loved ones Life Ins. Policy number, social security number and date of death available as these will be items they will ask for.

Veterans Benefits

(your funeral director will explain the benefits available regarding burial, flag, marker and honor guard for your deceased loved one) Other VA benefits may be available outside of these mentioned. Here are some Toll Free Numbers to help.

Health Benefits 877 222-8387

VA life Insurance 800 669-8477

Serv. Group life 800 419-1473

Or Locally 805 385-6366

Employers Benefits

Most employers have a contact person inside the company that will help with benefits such as a human resource specialist, a phone call or letter will help here.

(Sample Letter) Dear...

This is to inform you that (deceased) passed away on (month, day, year). Please tell me of any employee benefits such as group life insurance, pension funds, accrued vacation or sick pay, disability pay, credit union etc and whom they are payable. Please send me a list of documents that you will need and forms that I must complete as beneficiary.

Rose Family Funeral Home is pleased to continue its tradition of caring through this helpful checklist.

Check List

- ✓ Obtain copies of Death Certificate
- ✓ Make copies of dated obituary notice. Some Life Ins. Company's ask for a copy.
- ✓ Check contents of safe deposit box.
- ✓ Review Will / Trust / Power of attorneys with attorney if needed.
- ✓ Make copies of birth certificates and marriage certificates. Some Ins. Company's and Social Security will ask for these.
- ✓ Assemble all Life Ins. Policies.
- ✓ Locate DD 214 Military Discharge Papers. Your funeral director will need a copy.
- ✓ File for Life Ins. Benefits.
- ✓ File for Social Security Benefits.
- ✓ File for Veterans Benefits.
- ✓ File for Fraternal, Union & Association Benefits.
- ✓ File for Employers Benefits.
- ✓ Contact creditors.
- ✓ Check Health Ins. continuation.
- ✓ Transfer house and car title into your name.
- ✓ Establish credit in your name.
- ✓ Review your Life Ins. Policy beneficiaries.
- ✓ Review your Will.