

# DEATH NOTIFICATION CHECKLIST

When a family member or friend has died, it is important to notify various government agencies, banks, creditors and credit reporting agencies of the death. To reduce the risk of identity theft, these notifications should be made promptly after the death.

To expedite notification, you should initially make the contact by telephone followed by written verification. For many of the government agencies and financial entities, you will need the decedent's social security number, a copy of the death certificate, and, if you are a personal representative (executor) of the estate, your appointment form from the probate court. Make sure to retain copies of all notices that you send.

Below is a checklist of possible agencies and businesses that should be notified of the death. Because each individual case is unique, the list may not be complete. Also, the funeral home may have notified some of the government agencies on your behalf. Please consult with the funeral director when you receive this list so you can check off those agencies which have been notified by the funeral director.

## I. GOVERNMENT AGENCIES

- A.  Social Security Administration, 800-772-1213 (everyone).
- B.  Veteran's Administration (if decedent was formerly in the military).
- C.  Defense Finance and Accounting Service, 216-522-6680 (military service retiree receiving benefits).
- D.  Office of Personnel Management, 888-767-6738 (if decedent is a retired or former federal civil service employee).
- E.  U.S. Citizenship and Immigration Service, 800-375-5283 (if decedent was not a U.S. citizen)
- F.  State Department of Motor Vehicles (if decedent had a driver's license or state ID).
- G.  State and/or County Board of Elections (if decedent was a registered voter).

## II. U.S. POST OFFICE

If the decedent lived alone, uncollected mail might accumulate and attract unwanted attention. To forward the decedent's mail to another address, the executor or administrator of the decedent's estate needs to obtain a change of address form (USPS Form 3575) either online or at the local Post Office location, fill it out and file it. This can be done online or in person. You will need to certify on the form that you are the person who has been appointed by the probate court to act as executor or administrator of the estate.

### III. FINANCIAL COMPANIES

- A.  Credit card and merchant card companies.
- B.  Banks, savings and loan associations, and credit unions.
- C.  Mortgage companies and lenders.
- D.  Financial planners and stockbrokers.
- E.  Pension providers.

### IV. INSURANCE AND ANNUITY COMPANIES

- A.  Life insurers and annuity companies.
- B.  Health, medical and dental insurers.
- C.  Disability insurer.
- D.  Automotive insurer.
- E.  Mutual benefit companies.

### V. CREDIT REPORTING AGENCIES

There are three national credit reporting agencies which you should notify of the death and instruct them to list all accounts as: "Closed. Account Holder is Deceased." You may also request a credit report to obtain a list of all creditors and to review recent credit activities. A credit reporting agency notification form is found on page 3 for your convenience.

- A.  Experian, 888-397-3742, P.O. Box 4500, Allen, Texas 75013.
- B.  Equifax, 800-525-6285, P.O. Box 105139, Atlanta, Georgia 30348.
- C.  TransUnion, 800-680-7289, P.O. Box 2000, Chester, Pennsylvania 19022 - 2000.

## VI. MEMBERSHIPS

- A.  Professional associations and unions.
- B.  Health clubs and athletic clubs.
- C.  Automobile clubs.
- D.  Video rental stores.
- E.  Public library.
- F.  Alumni clubs.
- G.  Rotary, Kiwanis, Lions, Veterans' organizations and clubs.

## VII. SOCIAL MEDIA PROFILES

On page 5, there are instructions on notifying several of the most popular social media sites of a death. Since these websites provide various options, it is always advisable to visit the website and determine what course of action may be best. For example, with Facebook, there are three options upon a report of a death. The first would be to permanently delete the decedent's account. A second option is to "memorialize" the account which allows Facebook friends of the decedent to view the profile and post memorial messages. The final option is available if the decedent, during his or her lifetime, designated a Legacy Contact. The individual who had been designated as the Legacy Contact would be able to post to the profile to share funeral information and to extend appreciations.

Websites for social media sites are as follows:

- A.  Facebook – [www.facebook.com/help](http://www.facebook.com/help)
- B.  Twitter – <https://support.twitter.com/articles/87894>
- C.  LinkedIn – [www.linkedin.com/help/linkedin/ask/ts-rdmlp](http://www.linkedin.com/help/linkedin/ask/ts-rdmlp)
- D.  Instagram – <https://help.instagram.com/264154560391256/>
- E.  Google and YouTube – <https://support.google.com/accounts/troubleshooter/6357590?hl=en>

## VIII. DO NOT CONTACT LISTS

For a fee of \$1.00, you can list the decedent's name on the Deceased Do Not Contact List which is maintained by the Direct Marketing Association. All members of the Direct Marketing Association will delete the decedent's name from their mailing lists once the name is posted. A website for registering the name is set forth below:

- A.  Direct Marketing Association (register at [www.ims-dm.com/cgi/ddnc](http://www.ims-dm.com/cgi/ddnc)).

**CREDIT REPORTING AGENCY NOTIFICATION**

1. Credit Agencies: Check below each Credit Reporting Agency you wish to send this Notification. It is recommended that you send the Notification to each Credit Reporting Agency with copies of the death certificate and, if you are the personal representative of the estate, your appointment papers from the Probate Court. Prior to sending, make copies for your records.

<input type="checkbox"/> Experian P.O. Box 4500 Allen, Texas 75013	<input type="checkbox"/> Equifax P.O. Box 105139 Atlanta, Georgia 30348	<input type="checkbox"/> TransUnion P.O. Box 2000 Chester, PA 19022-2000
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2. Identification Information: Fill in the information below for yourself as Requesting Party and for the Decedent.

<u>Requesting Party</u>	<u>Decedent</u>
Name: _____	Name: _____
Address: _____ _____	Date of Death: _____
Phone Nos.: _____ (w)	Date of Birth: _____
_____ (h)	Location of Birth: _____
	Social Security No.: _____

3. Prior Addresses of Decedent: List the addresses of all residences of the Decedent over the past five years starting with the most recent:

(a) \_\_\_\_\_

(b) \_\_\_\_\_

(c) \_\_\_\_\_

4. Relationship of Requesting Party to Decedent: Please identify your relationship to the Decedent.

Spouse       Personal Representative of Estate       Other: \_\_\_\_\_

5. Directions to Credit Agency: Please initial each request you wish to make to the Credit Agency receiving this Notification.

\_\_\_\_\_ Post on the Decedent’s credit report: “Deceased. Do Not Issue Credit.”

\_\_\_\_\_ Please forward to me at the address listed above the current copy of the Decedent’s credit report.

Date: \_\_\_\_\_

\_\_\_\_\_  
Signature of Requesting Party

## **INFORMATION ON NOTIFYING SOCIAL MEDIA SITES ABOUT A DEATH**

1. Facebook:
  - (a) Go to [www.facebook.com/help](http://www.facebook.com/help);
  - (b) Click on “Manage Your Account” link on left side of page;
  - (c) Click “Memorialized Accounts” link;
  - (d) You will need a death certificate or other proof of death (obituary);
  - (e) You will need proof of your authority like a Power of Attorney, Birth Certificate, Last Will or Testament, or your appointment as executor or administrator of the estate;
  - (f) Submit information using Facebook’s online form.
  
2. Twitter:
  - (a) Go to <https://support.twitter.com/articles/87894>;
  - (b) Click on “Use this Form” and then select “I want to request the deactivation of a deceased or incapacitated user’s account.”;
  - (c) Fill out the Report Form and submit to Twitter. Twitter will follow-up after reviewing the Report.
  
3. LinkedIn
  - (a) Go to [www.linkedin.com/help/linkedin/ask/ts-rdmlp](http://www.linkedin.com/help/linkedin/ask/ts-rdmlp);
  - (b) Fill in information about yourself and the decedent on the form;
  - (c) Add a link to an obituary or related news article on the death;
  - (d) Submit report.
  
4. Instagram:
  - (a) Go to <https://help.instagram.com/264154560391256/>;
  - (b) Select if you want to memorialize or remove the account;
  - (c) You will need decedent’s birth certificate and death certificate and your appointment as executor or administrator of the decedent’s estate;
  - (d) Fill out the online form and submit.
  
5. Google and YouTube:
  - (a) Go to <https://support.google.com/accounts/troubleshooter/6357590?hl=EN>;
  - (b) Click on “Close the account of a deceased user.”;
  - (c) Fill in your and the decedent’s information;
  - (d) You need to scan your government-issued ID or driver’s license;
  - (e) You will need to scan decedent’s death certificate;
  - (f) Submit.