

Who to Notify After a Death

A checklist of the people, agencies, and companies to contact when a loved one passes.

Work through these as you're able — there's no need to do it all at once. Have several certified death certificates on hand; most will ask for one. Tip: the funeral home often reports the death to Social Security, but confirm it was done.

GOVERNMENT & BENEFITS

- ☐ **Social Security Administration** — report the death; stop/adjust benefits. 1-800-772-1213
- ☐ **U.S. Postal Service** — forward or hold mail
- ☐ **Massachusetts RMV** — cancel driver's license, transfer/cancel registration
- ☐ **IRS & MA Dept. of Revenue** — final income tax returns
- ☐ **Dept. of Veterans Affairs** — if a veteran, benefits & burial
- ☐ **Town clerk** — voter registration

FINANCIAL

- ☐ **Banks & credit unions**
- ☐ **Investment / brokerage firms**
- ☐ **Mortgage lender**
- ☐ **Credit card companies**
- ☐ **Credit bureaus** — Equifax, Experian, TransUnion (place a "deceased" alert to prevent fraud)
- ☐ **Pension / retirement plan administrators**

INSURANCE

- ☐ **Life insurance** — file claims
- ☐ **Health insurance / Medicare / MassHealth**
- ☐ **Auto & homeowners insurance** — keep the home covered

WORK & HOME

- ☐ **Employer** — final pay, benefits, group life insurance
- ☐ **Utilities** — electric, gas, water, phone, internet
- ☐ **Landlord or HOA**
- ☐ **Subscriptions & memberships**
- ☐ **Digital accounts** — email, social media, cloud, autopay

PROFESSIONALS

- ☐ **Probate attorney**
- ☐ **Accountant / tax preparer**
- ☐ **Financial advisor**

Not legal or financial advice. This is a general checklist to help you get organized; your situation may involve more or fewer contacts. Confirm estate-specific steps with a licensed Massachusetts probate attorney. Next Step Probate is a real estate service, not a law firm.

SOURCES

Social Security Administration (ssa.gov) · U.S. Postal Service (usps.com) · Massachusetts RMV (mass.gov) · Equifax, Experian & TransUnion (deceased-notification programs) · IRS (irs.gov)

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