

CHECKLIST DUE TO DEATH OF RETIREE/SURVIVOR

1. Identify Federal Retirement Account (CSRS or FERS) and any life insurance (FEGLI) due survivor(s). Call the Office of Personnel Management (OPM) toll free at 1/888-767-6738 and provide:

Full name of deceased

CSA or CSF number issued to the retiree/survivor (usually a 7-digit) number

Social Security Number

Date of Death (DOD) and Date of Birth (DOB)

Return all checks received after DOD. Notify bank of retiree or survivor of death, if direct deposit was used. OPM will then prorate the amount due the survivor.

NOTE: If you wish to write to OPM to provide the above information, the address

is: Office of Personnel Management

Retirement Operations Center

PO Box 45

Boyers, PA 16017 - 0045

2. Call Social Security Administration (SSA) at 1/800-772-1213 if deceased was receiving benefits. Provide the following:

Full name of deceased

Social Security Number

Date of death and date of birth

Return all SSA checks received after DOD. Benefits are not paid by the SSA for month of death regardless of what day the death occurred.

3. Call Veteran's Administration (VA) at 1/800-827-1000 if a veteran or a retired military to obtain information about death benefits for funeral expenses. Provide Name, SS#, and DOD.

4. Call the following appropriate military component if a retired military member. Provide Name, SSS#, and DOD:

(a) Air Force - 1/877-353-6807 (b) Navy - 1/800-368-3202 (c) Army - 1/800-626-3317

(d) Marine Corps - 1/800-847-1597 (e) Coast Guard - 1/800-323-7233

5. Provide Thrift Savings Plan (TSP) personal identification number (PIN) and call the TSP agency at 1/504-255-6000 to report death. Provide Name, SS#, and DOD.

6. Name of Credit Union, phone number, POC and accounts to include checking, savings, share savings or any loan accounts. Provide Name, SS#, and DOD.

7. Names of other financial institution, phone number, POC, and identify accounts, i.e., bank checking, savings and any outstanding loans. Provide Name, SS#, and DOD.

8. Identify investment companies, phone number, POC, and list of stocks, bonds, and mutual funds. Provide Name, SS#, and DOD.
9. Provide names of insurance companies, phone number and POC for each. List type of insurance, i.e., car insurance, house insurance, health insurance, disability insurance, and other (than government if retired civilian/military) life insurance policies in force in the private sector.
10. If applicable, identify location of safe deposit box. Is it at home or do you have a bank safe deposit box?
11. Identify wills or living trusts - location of documents and name of attorney/POC and phone number.
12. Property/Properties Documents - Where are deeds/documents kept? Need to provide complete address of each property owned. If rental property, provide name of each with phone number and POC.
13. Call all doctor offices to close records. Provide name of Clinic, Doctor, and phone number for each used.
14. Call local Pharmacy and Mail Order Pharmacy used to close records. Provide name of Pharmacy and phone number for each.
15. Call the NARFE National Office, 1/800-456-8410, if a member to cancel membership or transfer to surviving spouse.
16. Identify all credit card accounts and provide name and phone number for each account, i.e., Master Card, Visa, American Express, Discover Card, etc., and especially telephone calling card accounts.
17. Call VFW, if a member, to cancel membership and to inquire about death benefits payable.
18. Call American Legion, if member, to cancel membership. Inquire about death benefits payable.
19. Call any social club (Elks, Golf Course Membership, Knights of Columbus, etc.) if member to cancel membership.
20. Provide a written list of last wishes to include arrangements of funeral services, list of distribution/disbursement of personal items in home (jewelry, furniture, clothing, etc.)
21. Death Certificates - Obtain 12 certified copies from the Funeral Home. Death certificates cannot be copies made by a copying machine. They must be Certified copies with

a State Seal. You will need one for OPM, SSA, FEGLI, VA, and other insurance claims, bank accounts, credit union accounts, etc.

22. Cancel long term care (LTC) if applicable. Identify company and POC.

23. If on Medicaid (state assistance) this needs to be cancelled.

Not mentioned above. If your house shows joint ownership, you have a certain amount of time to transfer the title to your name ONLY or joint ownership with your POC, if desired. You must contact the County Records Office in the County Courthouse to do this.