Documents You May Need to Complete the To-Do List:

- Social Security Card (deceased)
- Marriage Certificate
- Birth Certificate for each child, if applicable
- Insurance Policies
- Deed and Titles to Property
- Bank Books
- Discharge Papers for Veteran (DD214)
- Recent Income Tax Forms and W-2 Forms
- Automobile Title and Registration Papers
- Loan and Installment Payment Books and/or Contracts

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To-Do List

- Look over the Veteran Death and Survivor benefit pages.
    - To learn about benefits both you and the Veteran are entitled to.
- Obtain 10-15 copies of the Death Certificate.
    - The funeral home can help you or you can contact the vital records office (in the state death occurred).
- Account for all ongoing bills. What bills were they responsible for and still need to be paid?
    - Car, house, utilities, etc.
        - **IMPORTANT NOTE:**
            - You are **NOT** required to accept the debt of the departed (if you are not party to the debt). Meaning if you did not co-sign things then the debt is (generally) owed just by the Veteran's estate. So if they had a mountain of credit card debt you do **NOT** have to assume the debt!
- If Veteran received VA Disability or Pension benefits:
    - Contact the VA at 1-800-827-1000.
- If Veteran received Social Security benefits:
    - Contact your local Social Security office at 1-800-772-1213.

        - Surviving spouse, ask about your eligibility for increased benefits. Also, check on benefits that any *minor* children may be entitled to receive.

- If Veteran retired from the military:
    - Contact Defense Enrollment Eligibility Reporting System (DEERS) at 1-800-538-9552.
    - Contact Defense Finance and Accounting Service (DFAS) at 1-888-332-7411.
- If Veteran retired or was working (employed when they died) from/at a Federal Civil Service job:
    - Contact the Office of Personnel Management (OPM) at 1-888-767-6738.
- If Veteran was working:
    - Contact their employer for information on pension plans and any death benefits.
- Contact their health insurance provider regarding terminating coverage for the deceased while continuing coverage for yourself/others covered through the policy.
- Contact their life insurance companies for all their life insurance policies.
    - You will generally need to provide the policy number and a certified copy of the death certificate and fill out a claim form.
    - If the deceased is listed as the beneficiary on any other policy, arrange to have their name removed.
    - If the Veteran was enrolled in the Servicemember's Group Life Insurance plan (SGLI), Veteran's Group Life Insurance (VGLI), or Family SGLI (FSGLI) call the VA at 1-877-832-4943.
    - If the Veteran was enrolled in other VA policies such as Service-Disabled Veterans Insurance (S-DVI) and VALife call the VA at 1-800-669-8477.
- Banking/Investments:
    - Change any joint bank accounts into just your name.
    - If the deceased's estate is in trust, check with the Trust Department or Customer Service at the bank.
    - Contact the banks/companies that held their investments to have assets transferred.
- If the deceased owned a car, transfer the automobile title into your name at the Secretary of State's Office, or if the estate is probated, through Probate Court.
- Seek the advice of an accountant or tax advisor about filing the deceased's tax return for the year of the death. Keep monthly bank statements on all individual and joint accounts that show the account balance on the day of death, since you will need this information for the estate tax return.