

Survivor's Checklist

First Steps

- Make arrangements with a reputable funeral home
- Obtain 10-15 certified death certificates
- For Veterans, contact the Department of Veteran Affairs at 1.800.827.1000 to apply for burial allowance, flag and headstone

Documents to Locate

- Social Security card
- Birth and marriage certificate, also divorce documentation, if applicable
- All automobile titles and property deeds
- Life, health and property insurance policies
- Bank, credit card and investment statements
- Unpaid bills
- Income tax returns

When You Contact Texell

- We will need a certified death certificate

Contact Other Organizations

- Social Security Administration at 1.800.772.1213
- Life insurance companies
- Current and past employers for group life insurance benefits or pension plans
- Banks and other credit unions to transfer ownership or close accounts
- Creditors to check for credit life or accidental death insurance

Attend to Financial Matters

- Complete a budget and continue to pay bills, such as mortgage and vehicle payments, if applicable
- Meet with a financial planner if you received an inheritance.
- Seek the advice of an accountant or tax advisor to file the deceased's tax return for the year of the death

When you are ready, we can help. Call a Financial Service Specialist at 254.773.1604 for assistance.