



Losing a Spouse or Parent

You may be overwhelmed with grief right now. You may want to leave the administrative matters for a later day. But there are notifications and legal steps that should not be postponed.

- Make Funeral and burial arrangements.
- Obtain several copies of the death certificate.
- Gather relevant documents, such as the will, insurance policies, trusts, and stock, bank account and annuity statements.
- Contact the Social Security Administration (if the deceased was an eligible recipient).
- Send a notification and death certificate to the director of health services (if the deceased was a Medi-Cal recipient) within 90 days after the death.
- Notify any life insurance companies of the death.
- Contact the trustee of any trust and/or the attorney who prepared it.
- Contact the executor of the will and/or the attorney who prepared it.
- Call the administrator of the decedent's pension plan.
- Notify the decedent's banks and financial institutions.
- Contact credit card companies.
- Be sure that insurance or Medicare claims have been processed before paying any medical bills.