University of Pittsburgh
Documentation/Activity Checklist
In the Event of a Death

1. Collect important papers - Immediately
   A. Death Certificate (10-12 copies initially)
      Obtained through funeral director or county health department
   B. Insurance Policies
      Call your agent or the insurance company directly
   C. Marriage License (if you are the spouse of the deceased)
      Obtained through county clerk where your marriage license was issued
   D. Birth Certificates (if deceased had dependent children)
      Obtained through public health office of the state or county where the child was born
   E. Will
      Contact the deceased's lawyer or check in safe deposit box
      You will need the original will
   F. Veteran's Discharge Papers
      Write to:
      National Personnel Records Center (Military)
      9700 Page Boulevard
      St. Louis, MO  63172
   G. Social Security Numbers
   H. Most recent tax return

2. Contact the University to Report the Death
   A. Department and Colleagues
   B. University of Pittsburgh Retiree Benefits Service Center (888) 499-6885 x3
      or Benefits Department for Active Faculty and Staff  (412) 624-8160

3. Contact an attorney - First month
   A. File for Probate of Will?
4. Apply for Benefits - First month

A. Life Insurance Proceeds
   Individually purchased policy
   University of Pittsburgh Group Life
   Aetna - (888) 584-2983 should be contacted to report a death claim
   Association policies
   Credit life insurance

B. Retirement Plan Benefits
   University of Pittsburgh Retirement Program
   TIAA-CREF - (800) 842-2776

C. Veteran’s Benefits
   Department of Veteran Affairs (VA) - www.va.gov

D. Healthcare and Related Benefits
   Active Faculty and Staff Member Benefits
   Call the University of Pittsburgh’s Benefits Department at (412) 624-8160
   for continuation of benefits for Surviving Spouses and/or COBRA. Active benefits
   may have included medical, dental, vision, prescription drug coverage, long-term
   care etc.

   Retired Faculty and Staff Member Benefits
   Call the University of Pittsburgh’s Retiree Benefits Service Center
   at (888) 499-6885 x3 for continuation of benefits for Surviving Spouse
   and/or COBRA. Retiree benefits may have included medical, dental, vision,
   prescription drug coverage, long-term care etc...

E. Payroll - Final Check
   Contact the University of Pittsburgh’s Payroll Department (412) 624-8070

F. Social Security
   Social Security - (800) 772-1213
5. Change Titles and Ownership - One to three months

A. House
If you owned a house with the deceased and there is an outstanding mortgage, you are now responsible for that debt.

B. Insurance Policies
Evaluate coverage to determine if you need to increase or decrease; check your beneficiaries to see if they need to be updated.

C. Automobile
Change the title through the Department of Motor Vehicles. You may also need to change the name on the policy of your automobile insurance.

D. Your Will
Update your will if you have left property to the deceased.

E. Credit Cards
Cancel credit cards exclusively in the name of the deceased. Outstanding balances should be paid by the estate.

Notify credit card companies if you have cards in both your names. Continue to make payments.

F. Bank Accounts
If you had a joint bank account with the deceased, it will usually pass to you automatically. Speak with a bank representative to see about changing the title and signature card on the account.

G. Stocks, Bonds and Other Investments
If you shared investments and ownership passes directly to you, check with your stockbroker to change title on stocks, bonds, mutual funds, etc.

If the deceased owned the investment account(s) in his or her name only, title will be changed to the beneficiary

H. Safe Deposit Box
You will need a court order to open any safe deposit box rented only in the name of the deceased.

Only the will, life insurance policies or other documents related to death can be removed from the box until the will has been probated.
6. Complete Notifications - One to three months
   Consider notifying alumni groups, professional organizations, societies and any other
groups to which the deceased person belonged.

7. Consider Hiring an Accountant - Three to six months
   Can guide you in preparing tax forms and give you valuable information on state estated
tax, inheritance or gift tax, and fiduciary income tax, if applicable.

8. Review Finances - Three to six months
   Put together a short-term budget

9. Complete Estate Settlement - By month nine
   File and pay estate and gift taxes.