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

DONE N/A

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 - (800) 523-5065 should be contacted to report a death claim

Association policies

Credit life insurance

B. Retirement Plan Benefits

University of Pittsburgh Retirement Program
TIAA - (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.