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 ex: 3
      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. Health Care 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 Services Center at 888-499-6885 ex. 3 for continuation of benefits for Surviving Spouses 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 at 412-624-8070.

F. Social Security
   Social Security: 800-772-1213

5. Change Titles and Ownership
   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 of your names. Continue to make payments.

   F. Bank Accounts
      If you have 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.