

SURVIVING SPOUSE CHECKLIST

Provided by Ellen R. Schleicher, Register of Deeds

This checklist is provided to help you know what you've done and what still needs to be done.

- _____ Applied for Social Security lump-sum benefit
- _____ Applied for Social Security Widow's/Widower's benefits
- _____ Checked for benefits with organizations of which deceased was a member, examples:
 - Traveler's Protection Association
 - United Commercial Travelers
 - Fraternal Organizations
 - Labor Unions
- _____ Applied for Veteran's Pension, if eligible
- _____ Applied for other Veteran's benefits: Marker, flag, etc.
- _____ Checked into private pension
- _____ Filed the will of the deceased
- _____ Filed for Life Insurance
- _____ Changed beneficiaries on life insurance policies
- _____ Applied for refund of paid insurance premiums—automobile & health
- _____ Prepared a new will
- _____ Filed Homestead Credit
- _____ Disposed of the personal belongings of the deceased including automobile, safety deposit box, and other assets
- _____ Checked out health insurance
- _____ Transferred title – house, other real estate