



County of Passaic

Historic Court House, Room 101

71 Hamilton Street • Paterson, New Jersey 07505-2023

Passaic County Surrogate's Court

TEL: (973) 881-4760

FAX: (973) 523-3449

surrogateinfo@passaiccountynj.org

A SURVIVOR'S CHECKLIST

Immediately

- Get a legal pronouncement of death.
 - **If person dies at home under hospice care:** call the hospice nurse, who can declare the death and help facilitate transport of the body.
 - **If person dies at home without hospice care:** call 911 and have in hand a do-not-resuscitate document, if it exists. Without one, paramedics will generally start procedures and, except where permitted to pronounce death, take the person to an emergency room for a doctor to make declaration.
- Arrange for transportation of the body. If no autopsy is needed, the body can be picked up by a mortuary or crematorium.
- Notify the decedent's doctor or the county coroner.
- Notify close family and/or friends of the deceased.
- Notify clergy.
- Notify employer.
- If deceased cared for dependents and pets, make immediate arrangements for their care.
- Look for records of the deceased person's desire to donate organ or tissue. Give this information to the deceased's doctor or hospice.
- Arrangements
 - Look for any written instructions for funeral or service arrangements, and burial or cremation arrangements.
 - Look to see if the deceased named a "Designated Agent" to take care of these arrangements.
 - Look for any prepaid services, such as a burial service or cremation.

Within a few days

- If you are the "Designated Agent," meet with funeral director to arrange the funeral and prepare an obituary.
 - The funeral home will need the following information:
 - Deceased's first, middle and last name.
 - Deceased's maiden name (if applicable).
 - Deceased's home address.
 - Deceased's social security number.
 - Deceased's date of birth.
 - Deceased's age.
 - Deceased's date of death.
 - Deceased's gender.
 - Deceased's race/ethnicity.
 - Deceased's marital status.
 - Deceased's spouse's first and last name.
 - Deceased's highest level of education attained.
 - Deceased's occupation.
 - Deceased's place of birth (city and state).
 - Deceased's father's name, birth city, and birth state.
 - Deceased's mother's name, birth city, and birth state
 - If the deceased was a veteran:
 - Entered service date.
 - Entered service place.
 - Service number.
 - Separated from service date.
 - Separated from service place.
 - Grade, rank or rating.
 - Organization and branch of service.
- **If deceased was in the military or belonged to a fraternal or religious group:** contact the organization. It may have burial benefits or conduct funeral services.
- **If deceased was employed at time of death:** call the deceased's employer and request information about benefits and any pay due. Ask whether there was a life insurance policy through the company.

- Order certified copies of the death certificate from the funeral director. You will need one certified copy for each major asset (cars, land, bank accounts, insurance policies, veterans' survivor benefits and annuities).
- Arrange for headstone.
- Organize a post-funeral gathering.

After Funeral

- Find the deceased's important papers.
- Locate safety deposit box to look for important papers such as Will, final instructions, or cemetery plot deed.
 - **If there is a Will:** notify the executor (personal representative) named in the Will so that the Will may be entered into probate in the Surrogate's Court of the county where the deceased resided. Give the executor all the important papers.
 - **If no Will:** contact the Surrogate's Court of the county where the deceased resided to see who has the first right to do an administration.
- Locate other important papers and documents (this is usually the duty of the executor/administrator)
 - Deeds, Titles and Promissory Notes/Loans
 - Real estate property
 - Mortgage documents
 - Promissory notes
 - Vehicle titles/registrations
 - Membership certificates
 - Insurance policies
 - Life insurance
 - Accidental life insurance
 - Veterans' insurance
 - Employer or pension insurance
 - Funeral insurance
 - Mortgage and/or credit insurance
 - Credit card insurance
 - Health insurance

- Property insurance
 - Workers' compensation insurance
- Financial accounts
 - Bank accounts
 - Investment/brokerage accounts IRA, 401K's
 - Stocks and Bonds
 - Annuities
 - Credit and debit card accounts
 - Usernames and passwords for any online account
 - List of safety deposit boxes with keys and names of authorized users
- Other financial records
 - Survivor annuity benefits papers
 - Employer/retirement benefit plans, pension/profit sharing plans
 - Veteran's benefit records
 - Disability payment documents
 - Income statement for current year
 - IRS income tax returns
 - IRS gift tax returns
 - Property tax returns (for all years)
 - Business interests held, financial statements and agreements and contracts
 - Loan papers
 - Investment records
- Legal papers
 - Will and/or Trusts
 - Deceased's final instructions
 - Prepaid funeral contracts
 - Organ/tissue donation record
 - Social security card
 - Birth certificate (of all family members)
 - Marriage license or certificate
 - Military service papers
 - Court documents for adoptions and divorce
 - Community property agreements
 - Driver's license

- Passport, citizenship, immigration and/or alien registration papers
- Personal information
 - Name and contact information of closet family and friends
 - Names and contact information of lawyers, accountants, doctors
 - Family tree
 - Usernames and passwords for online accounts
 - Passwords to access computers, cell phones and other electronic devices

Practical Steps for the Executor/Administrator

- Locate and review all unpaid bills.
 - Regular monthly bills
 - Utility
 - Electric
 - Heating Telephone
 - Cable TV
 - Internet
 - Cell phones
 - Water
 - Sewer
 - Garbage
 - Long term debts
 - Home mortgage
 - Bank line of credit
 - Car loans
 - Rental payments
 - Home
 - Apartment
 - Assisted living
 - Nursing home
 - Credit cards
 - Insurances
 - Health

- Long term care
 - Homeowner's
 - Car
 - Life insurance
- Property taxes
- Locate last four (4) years of tax returns for tax return filings.
- Access bank accounts.
- Get an EIN (Estate Identification Number) from IRS to open estate checking account and use for estate filings.
- Check and take care of the deceased's home (removing perishables) and property.
- Put valuables in a safe place.
- Contact Post Office for forwarding information.
- Stop all unneeded newspaper deliveries.
- Cancel any appointments for doctors, dentist, etc.
- Cancel services that are no longer needed.
 - Cell phone
 - Internet
 - Cable TV
- Do not cancel utilities until no longer needed.
- Give notice of death to all the above as soon as possible.
- Check and apply for any death benefits or survivors' benefits.
- Contact social Security Administration and other government offices.
 - Notify the Registrar of Voters.
 - Contact Motor Vehicles to cancel deceased's driver's license and transfer titles of all registered vehicles.
- Notify all three (3) credit reporting agencies and get copy of credit report.
- Send acknowledgements cards for flowers, donations, food, kindness, pallbearers.
- Organize and distribute decedents personal belongings according to Will or memorandum.
- Contact a tax preparer. Keep monthly bank statements on all individual and joint accounts that show account balance on the day of death.

Important Contact Information

Passaic County Surrogate:

for Probate of Will or Administration of the estate *(if decedent was a resident of Passaic County at the time of death)*

973-881-4760

passaiccountynj.org/surrogate

Department of Veteran's Affairs

1-800-827-1000

Social Security Administration

1-800-772-1213

Credit Reporting Agencies

Equifax	1-800-685-1111	www.Equifax.com
Trans Union	1-800-888-4213	www.TransUnion.com
Experian	1-888-397-3742	www.Experian.com

Estate Identification Number (EIN) www.irs.gov