



**JEWISH FUNERALS**

Jewish-owned and operated since 2001

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# **TRANSITIONAL CARE GUIDE**

# GETTING STARTED

## TRANSITIONAL CARE GUIDE

This guide is provided by Jewish Funerals USA to help guide you as you handle the critical tasks following the loss of a loved one.

Download and save this document. As you enter information, the subsequent pages will get filled in with the same information so it is handy for each step of the process.

Your Name: \_\_\_\_\_

Name of Deceased: \_\_\_\_\_

Date of Birth of Deceased: \_\_\_\_\_

Deceased Date: \_\_\_\_\_

Deceased's Relationship to You: \_\_\_\_\_

Deceased's Social Security Number: \_\_\_\_\_

Estate Identification Number: \_\_\_\_\_

*This guide is intended to assist you in handling important steps after the death of a loved one. It should not be used as a replacement for legal, financial or other professional counsel. We encourage you to contact your legal and/or financial advisor.*

*Jewish Funerals USA specifically disclaims any liability, loss, or risk, personal or otherwise, incurred as a consequence, either directly or indirectly, by commission or omission, from the use and/or application of all or any portion of the Transitional Care Guide.*



## OVERVIEW: LOCATE IMPORTANT DOCUMENTS

These items should be located to access information and close accounts:

- Birth certificate
- Social Security and pension information
- Marriage certificate
- Honorable discharge papers (DD-214) for a veteran and VA Claim Number
- Will, trust and letter of instruction
- Pre-need planning paperwork from funeral home
- Cemetery arrangements – deeds to plots
- Life insurance policies
- List of retirement, bank and brokerage accounts (with account and access information)
- Contact information for attorney, accountant, financial planner and stockbroker
- List of retirement, bank and brokerage accounts (with account and access information)
- Username and passwords to online accounts (bill pay, email, Facebook, etc.)
- Health insurance policies
- Deeds and titles to property
- Titles and warranties to cars, motorcycles, boats, etc.
- List of stored valuables (e.g. jewelry)
- Safe combinations
- Automobile title and registration papers
- Stock certificates
- Recent income tax and W-2 forms
- Loan and installment payment books and contracts
- Safety deposit box key



# COORDINATE WITH ADVISORS

## TASK 1: CONTACT ATTORNEY

### COMMUNICATION TYPE: PHONE CALL

#### REFERENCE INFORMATION

Date: \_\_\_\_\_

Attorney Name: \_\_\_\_\_

Phone Number: \_\_\_\_\_

Deceased's Social Security Number: \_\_\_\_\_

### CALL SUBJECT: DEATH NOTIFICATION, WILL READING AND OBTAINING COPIES

*This call script presumes you are contacting an attorney with whom you and/or the deceased maintained an ongoing relationship. If you are contacting a prospective attorney to help you with your legal matters, simply introduce yourself and explain your situation. You may also wish to ask for references and confirm that the attorney/firm carries malpractice insurance.*

#### CALL SCRIPT

Hello, my name is \_\_\_\_\_. I am calling to notify your firm of the death of my \_\_\_\_\_, \_\_\_\_\_. I am presently in the process of organizing and handling the deceased's business affairs and will need your support with several matters, including:

- The Will (and Codicil)
- Letters of Authority for Personal Representative (aka Executor)  
*(Assigned by the Court to the "Survivor" to act on the Deceased's behalf)*
- Probate (Register of Wills)
- Taxes
- Insurance
- Guardianship
- Other Common Items

Can you tell me when would be a good time to schedule a meeting? Also, can you give me an idea of the costs that will be involved for your services, and an indication of what documents you will need?



# COORDINATE WITH ADVISORS

## TASK 2: CONTACT ACCOUNTANT

### COMMUNICATION TYPE: PHONE CALL

#### REFERENCE INFORMATION

Date: \_\_\_\_\_

Accountant Name: \_\_\_\_\_

Phone Number: \_\_\_\_\_

Deceased's Social Security Number: \_\_\_\_\_

Estate Identification Number: \_\_\_\_\_

### CALL SUBJECT: NOTIFY OF DEATH AND REQUEST FINANCIAL DOCUMENTS

*This call script presumes you are contacting an accountant and/or tax/financial advisor with whom you and/or the deceased maintained an ongoing relationship. If you are contacting a prospective accountant to help you with your legal matters, simply introduce yourself and explain your situation. You may also wish to ask for references.*

#### CALL SCRIPT

Hello, my name is \_\_\_\_\_. I am calling to notify your firm of the death of my \_\_\_\_\_, \_\_\_\_\_. I am presently in the process of organizing and handling the deceased's business affairs and will need your support with several matters, including:

- Current Tax Return (Payments/Refunds)
- Past Tax Return (Payments/Refunds)
- Review of Financial Affairs/Accounting Activities
- Coordination with an Attorney
- Ongoing Relationship
- Other Common Items

Can you tell me when would be a good time to schedule a meeting? Also, can you confirm that your office is willing to provide financial services for the deceased's estate? Please provide an estimate of the costs that will be involved for your services, and an indication of what documents you will need.



# COORDINATE WITH ADVISORS

## TASK 3: CONTACT FINANCIAL ADVISORS

### COMMUNICATION TYPE: PHONE CALL

#### REFERENCE INFORMATION (BOTH INVESTMENTS AND RETIREMENT)

Date: \_\_\_\_\_

Deceased's Social Security Number: \_\_\_\_\_

Contact's Name: \_\_\_\_\_

Phone Number: \_\_\_\_\_

#### CALL SUBJECT: CONFIRM INVESTMENT/RETIREMENT ACCOUNTS BALANCE AND CLOSURE/TRANSFER

*This call script will assist you in contacting financial advisors (investment and retirement) with whom the deceased had existing accounts. You may have to contact several financial advisors since it is common to have up to a dozen individual accounts. In most cases, you will be required to complete standard forms and submit them with specific supporting documents to the financial advisors.*

#### CALL SCRIPT

Hello, my name is \_\_\_\_\_. I am calling to notify your firm of the death of my \_\_\_\_\_, \_\_\_\_\_. I am presently in the process of organizing and handling the deceased's business affairs and will need your support with several matters, including:

#### DECEASED'S RETIREMENT ACCOUNTS NUMBERS

· IRA: \_\_\_\_\_

· Roth IRA: \_\_\_\_\_

· Employer Pension: \_\_\_\_\_

· Mutual Funds: \_\_\_\_\_

· Stocks/Bonds: \_\_\_\_\_



# BENEFITS AND FINANCIALS

## TASK 1: CONTACT SOCIAL SECURITY

**COMMUNICATION TYPE:** PHONE CALL  
*(verify if we have already completed this task)*

### REFERENCE INFORMATION

Date: \_\_\_\_\_

Call 1-800-772-1213

Visit [ssa.gov/benefits/survivors](https://ssa.gov/benefits/survivors) for more information

You can find your SSA office at [secure.ssa.gov/ICON](https://secure.ssa.gov/ICON)

Contact's Name: \_\_\_\_\_

### CALL SUBJECT: DEATH NOTIFICATION AND INFORMATION ON BENEFITS

*This call script will assist you in contacting social security to notify them concerning the death of your loved one. Often, our funeral director will be able to contact social security on your behalf, so it is best to confirm with us before contacting social security.*

### CALL SCRIPT

Hello, my name is \_\_\_\_\_. I am calling to notify your firm of the death of my \_\_\_\_\_, \_\_\_\_\_. I am presently in the process of organizing and handling the deceased's business affairs and require your help. I would like to confirm if my \_\_\_\_\_ is eligible for benefits, and if so, how I proceed to claim their benefits.



# BENEFITS AND FINANCIALS

## TASK 2: CONTACT VETERAN AFFAIRS

### COMMUNICATION TYPE: PHONE CALL OR ONLINE

*(verify if we have already completed this task)*

### REFERENCE INFORMATION

Date: \_\_\_\_\_

Call 1-800-827-1000

Visit [cem.va.gov/burial\\_benefits](http://cem.va.gov/burial_benefits) for more information

Visit [benefits.va.gov/benefits/offices.asp](http://benefits.va.gov/benefits/offices.asp) to find the regional benefit location nearest you

### CALL SUBJECT: DEATH NOTIFICATION AND INFORMATION ON BENEFITS

*This call script will assist you in contacting Veterans Affairs to notify them concerning the death of your loved one. Often, our funeral director will be able to contact Veterans Affairs on your behalf, so it is best to confirm with us before contacting Veterans Affairs.*

Below are a few links to access information for the most common benefits:

**Burial Allowance:** [benefits.va.gov/BENEFITS/factsheets/burials/flag.pdf](http://benefits.va.gov/BENEFITS/factsheets/burials/flag.pdf)

**Burial Flag:** [vba.va.gov/pubs/forms/VBA-27-2008-ARE.pdf](http://vba.va.gov/pubs/forms/VBA-27-2008-ARE.pdf)

**Markers or Bronze Plaques:** [va.gov/vaforms/va/pdf/VA40-1330.pdf](http://va.gov/vaforms/va/pdf/VA40-1330.pdf)

### CALL SCRIPT

Hello, my name is \_\_\_\_\_. I am calling to notify your firm of the death of my \_\_\_\_\_, \_\_\_\_\_. I am presently in the process of organizing and handling the deceased's business affairs and require your help. I would like to confirm if my \_\_\_\_\_ is eligible for benefits, and if so, how I proceed to claim their benefits.





# BENEFITS AND FINANCIALS

## TASK 3: CONTACT LIFE INSURANCE COMPANIES

### COMMUNICATION TYPE: PHONE CALL

#### REFERENCE INFORMATION

Date: \_\_\_\_\_

Known Life Insurance Policies: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

#### CALL SUBJECT: NOTIFICATION OF DEATH, REQUEST TO PROCESS CLAIM AND ACQUIRE FORM

*This call page will assist you in contacting life insurance companies to handle the insurance claims. Most insurance companies prefer you to contact them on the phone and they will walk you through the process.*

#### CALL SCRIPT

Hello, my name is \_\_\_\_\_. I am calling to notify your firm of the death of my \_\_\_\_\_, \_\_\_\_\_. I am presently in the process of organizing and handling the deceased's business affairs and need some help. Can you please send me the forms I need to complete to file a claim?

#### SOME OF THE FORMS ARE:

- Death Claim Form
- Copy of Policies/Riders
- Continuance of Benefits Form
- Premium Refund Form
- Change of Beneficiary Form



# BENEFITS AND FINANCIALS

## TASK 4: GATHER FINANCIAL INSTITUTIONS ACCOUNTS

Date: \_\_\_\_\_

Institution Name: \_\_\_\_\_

Account Number: \_\_\_\_\_

Contact's Name: \_\_\_\_\_

Phone Number: \_\_\_\_\_

Notes: \_\_\_\_\_

\_\_\_\_\_

Date: \_\_\_\_\_

Institution Name: \_\_\_\_\_

Account Number: \_\_\_\_\_

Contact's Name: \_\_\_\_\_

Phone Number: \_\_\_\_\_

Notes: \_\_\_\_\_

\_\_\_\_\_

Date: \_\_\_\_\_

Institution Name: \_\_\_\_\_

Account Number: \_\_\_\_\_

Contact's Name: \_\_\_\_\_

Phone Number: \_\_\_\_\_

Notes: \_\_\_\_\_

\_\_\_\_\_



# **BENEFITS AND FINANCIALS**

## TASK 4: GATHER FINANCIAL INSTITUTIONS ACCOUNTS

Date: \_\_\_\_\_

Institution Name: \_\_\_\_\_

Account Number: \_\_\_\_\_

Contact's Name: \_\_\_\_\_

Phone Number: \_\_\_\_\_

Notes: \_\_\_\_\_

\_\_\_\_\_

Date: \_\_\_\_\_

Institution Name: \_\_\_\_\_

Account Number: \_\_\_\_\_

Contact's Name: \_\_\_\_\_

Phone Number: \_\_\_\_\_

Notes: \_\_\_\_\_

\_\_\_\_\_

Date: \_\_\_\_\_

Institution Name: \_\_\_\_\_

Account Number: \_\_\_\_\_

Contact's Name: \_\_\_\_\_

Phone Number: \_\_\_\_\_

Notes: \_\_\_\_\_

\_\_\_\_\_



# BENEFITS AND FINANCIALS

## TASK 5: CONTACT FINANCIAL INSTITUTIONS

### COMMUNICATION TYPE: PHONE CALL

Copy this page as needed for additional financial institutions.

### REFERENCE INFORMATION

Date: \_\_\_\_\_

Contact's Name: \_\_\_\_\_

Phone Number: \_\_\_\_\_

### CALL SUBJECT: CONFIRM ACCOUNT AND LOAN STATUS, TRANSFER ACCOUNT OWNERSHIP AND/OR CLOSE AN ACCOUNT, CANCEL DIRECT DEBITS/DEPOSITS AND OBTAIN SAFETY DEPOSIT BOX CONTENTS

*This call script will assist you in contacting financial institutions (banks, savings & loans, credit unions) with whom the deceased had existing accounts. You will likely want to determine account and loan status, transfer account ownership, cancel direct debits, and obtain safety deposit box contents. In most cases, you will be required to complete standard forms and submit them with specific support documents to the financial institutions. If you are uncertain about any aspect of transferring account ownership, be sure to consult your attorney and/or financial advisor.*

### CALL SCRIPT

Hello, my name is \_\_\_\_\_. I am calling to notify your firm of the death of my \_\_\_\_\_, \_\_\_\_\_. I am presently in the process of organizing and handling the deceased's business affairs and will need your support with several matters, including:

- Confirming Account(s) Status
- Confirming Loan(s) Status
- Canceling ATM/Debit Services
- Transferring Account Ownership
- Obtaining Safety Deposit Box Contents
- Other Common Items

Can you please review these matters with me now, and send me a copy of all relevant savings and loan information, account transfer information, and safety deposit box documents? If not, when would be a better time to call back, or do I need to meet with you in person?



# INVESTMENTS AND TITLES

## TASK 1: CONTACT AUTO INSURANCE COMPANY

### COMMUNICATION TYPE: PHONE CALL

#### REFERENCE INFORMATION

Date: \_\_\_\_\_

Deceased's Social Security Number: \_\_\_\_\_

Insurance Company: \_\_\_\_\_

Contact's Name: \_\_\_\_\_

Phone Number: \_\_\_\_\_

Car Make, Model, VIN: \_\_\_\_\_

#### CALL SUBJECT: CANCEL OR TRANSFER COVERAGE

*This call script will assist you in contacting auto insurance company(s) with whom the deceased had existing policy coverage. You will want to remove the deceased's name from the policy(s). In addition, you may want to transfer coverage to another individual or cancel coverage of an auto that has been sold. Inquire whether a refund is due to the deceased's estate.*

#### CALL SCRIPT

Hello, my name is \_\_\_\_\_. I am calling to notify your agency of the death of my \_\_\_\_\_, \_\_\_\_\_. I am presently in the process of organizing and handling the deceased's business affairs and will need your help reconciling the account. Specifically, I would like to:

- Cancel coverage as of: \_\_\_\_\_
- Remove the deceased's name from the policy
- Add the following names to the policy: \_\_\_\_\_
- Collect refunds due to the estate

Can you please review these matters with me now, and send me instructions to take care of this matter? If not, when would be a better time to call back, or do I need to meet with you in person?



# INVESTMENTS AND TITLES

## TASK 2: CONTACT AUTO LOAN/LEASE COMPANY(IES)

**COMMUNICATION TYPE:** PHONE CALL

### REFERENCE INFORMATION

Date: \_\_\_\_\_

Deceased's Social Security Number: \_\_\_\_\_

Auto Loan/Lease Account Number: \_\_\_\_\_

Contact's Name: \_\_\_\_\_

Phone Number: \_\_\_\_\_

### **CALL SUBJECT:** CANCEL OR TRANSFER COVERAGE

*This call script will assist you in contacting auto loan and/or lease companies with whom the deceased had accounts. In the case of a lease, you may wish to cancel the agreement and arrange to return the car or remove the deceased's name from the agreement and amend the agreement accordingly.*

*In the event of a loan, you will want to determine the status of the account and determine if the loan is covered by insurance. If you are uncertain about some aspect of the lease or loan agreement, consult your attorney and/or financial advisor.*



# INVESTMENTS AND TITLES

## TASK 2: CONTACT AUTO LOAN/LEASE COMPANY(IES)

### CALL SCRIPT

Hello, my name is \_\_\_\_\_. I am calling to notify your agency of the death of my \_\_\_\_\_, \_\_\_\_\_. I am presently in the process of organizing and handling the deceased's business affairs and will need your help.

*If it is a lease:*

- Cancel lease agreement
- Transfer to the following name: \_\_\_\_\_
- Schedule return of the vehicle

*If it is a loan:*

- Determine loan status
- Transfer to the following name: \_\_\_\_\_
- Schedule return of the vehicle

Can you please review these matters with me now, and send me instructions to take care of this matter? If not, when would be a better time to call back, or do I need to meet with you in person?



# INVESTMENTS AND TITLES

## TASK 3: CONTACT CREDIT CARD COMPANY(IES)

### COMMUNICATION TYPE: LETTER

#### REFERENCE INFORMATION *(duplicate for each credit card)*

Date: \_\_\_\_\_

Credit Card Company Name: \_\_\_\_\_

Credit Card Company Address: \_\_\_\_\_

Contact's Name: \_\_\_\_\_

#### LETTER SUBJECT: NOTIFICATION OF DEATH

*A print-ready version of the letter is available in the appendix*

RE: Notification of Death

To Whom It May Concern:

I am writing to report the death of my \_\_\_\_\_, \_\_\_\_\_ who passed away on \_\_\_\_\_. Specifically, I am writing in reference to the following credit card:

Credit card number: \_\_\_\_\_ Expiration Date: \_\_\_\_\_

I would ask you to please:

- Cancel the card
- Remove the deceased's name from the account and reissue the card in my name
- Change the billing address to:

Name of responsible party: \_\_\_\_\_

Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

In addition, please advise me:

- As to whether the account balance is covered by insurance
- With regard to the balance on this account as of the Date of Death

If you have questions or require any additional information, please do not hesitate to contact me at \_\_\_\_\_, or the address above.

Sincerely,

\_\_\_\_\_



# INVESTMENTS AND TITLES

## TASK 4: CONTACT MORTGAGE COMPANY(IES)

### COMMUNICATION TYPE: PHONE CALL

#### REFERENCE INFORMATION *(repeat for each open mortgage)*

Date: \_\_\_\_\_

Deceased's Social Security Number: \_\_\_\_\_

Loan Account Number: \_\_\_\_\_

Contact's Name: \_\_\_\_\_

Phone Number: \_\_\_\_\_

#### **CALL SUBJECT:** CONFIRM ACCOUNT AND LOAN STATUS, TRANSFER ACCOUNT OWNERSHIP OR CANCEL LOAN AND CANCEL AUTOMATIC WITHDRAWALS

*This call page will assist you in contacting the mortgage company or financial institution with whom the deceased had existing mortgage loan(s). You will likely want to determine account and loan status, transfer account ownership, or cancel direct debits. In most cases, you will be required to complete standard forms and submit them with specific support documents to the financial institutions. If you are uncertain about some aspect of transferring account ownership, consult your attorney and/or financial advisor.*

#### **CALL SCRIPT**

Hello, my name is \_\_\_\_\_. I am calling to notify your agency of the death of my \_\_\_\_\_, \_\_\_\_\_. I am presently in the process of organizing and handling the deceased's business affairs and will need your help.

- Confirming account(s) status
- Confirming loan(s) status
- Canceling ATM/debit services
- Transferring account ownership
- Other: \_\_\_\_\_

Would it be possible for you or another representative to review these matters with me now, and send me a copy of all relevant savings and loan information, account transfer information, and safety deposit box documents? If not, when would be a better time to call back or set a time to meet?



# INVESTMENTS AND TITLES

## TASK 5: CONTACT EMPLOYERS

### COMMUNICATION TYPE: LETTER

#### REFERENCE INFORMATION *(duplicate for each employer)*

Date: \_\_\_\_\_

Company Name: \_\_\_\_\_

Company Address: \_\_\_\_\_

Company City, State, Zip Code: \_\_\_\_\_

Contact's Name: \_\_\_\_\_

Phone Number: \_\_\_\_\_

### LETTER SUBJECT: NOTIFICATION OF EMPLOYEE DEATH

*(a print-ready version of the letter is available in the appendix)*

RE: Notification of Employee Death  
To Whom It May Concern:

I am writing to report the death of my \_\_\_\_\_, \_\_\_\_\_ who passed away on \_\_\_\_\_. I am handling the business affairs and require your assistance. I have attached the following documents for your reference:

- Death Certificate
- Deceased's Employee ID Number: \_\_\_\_\_

In return, could you please send me the following information and statements:

- Pension or retirement plans
- Gross amount of salary paid since the beginning of the current year
- Life insurance coverage due
- Company-owned items to be returned (computer, office keys, car, etc.)
- Other: \_\_\_\_\_

Also, could you please contact me regarding the removal of the deceased's personal belongings from the workplace. If you have questions or require any additional information, please do not hesitate to contact me at \_\_\_\_\_, or the address above.

Sincerely,

\_\_\_\_\_

# OUTSIDE COMMITMENTS

## TASK 1: CONTACT HEALTHCARE PROVIDERS



### COMMUNICATION TYPE: PHONE CALL

#### REFERENCE INFORMATION

Date: \_\_\_\_\_

Deceased's Social Security Number: \_\_\_\_\_

Deceased's Date of Birth: \_\_\_\_\_

Contact's Name: \_\_\_\_\_

Phone Number: \_\_\_\_\_

#### CALL SUBJECT: NOTIFYING OF DEATH AND RECONCILE ACCOUNTS

*This call script will assist you in contacting healthcare facilities, organizations and other providers (nursing home, hospice care, home healthcare aides, physicians) who cared for the deceased. In the case of a healthcare facility, you will want to coordinate the pick-up of the deceased's personal belongings. You will also want to confirm the status of the deceased's account with the facility. In the case of a physician or specialist, you will want to cancel any appointments previously scheduled. In addition, you will want to request the deceased's medical records.*

#### CALL SCRIPT

Hello, my name is \_\_\_\_\_. I am calling to notify your agency of the death of my \_\_\_\_\_, \_\_\_\_\_. I am presently in the process of organizing and handling the deceased's business affairs and require your help. Specifically, I would like to:

- Confirm status of account(s)
- Cancel previously scheduled appointments
- Collect the deceased's personal belongings/records

Can you please inform me of when I can arrange a time to come in and collect the records and belongings, and if there are any open account balances?



# OUTSIDE COMMITMENTS

## TASK 2: CONTACT MEMBERSHIPS AND COMMITMENTS

### COMMUNICATION TYPE: PHONE CALL

#### REFERENCE INFORMATION

Date: \_\_\_\_\_

Deceased's Social Security Number: \_\_\_\_\_

Deceased's Date of Birth: \_\_\_\_\_

Contact's Name: \_\_\_\_\_

Phone Number: \_\_\_\_\_

#### CALL SUBJECT: CANCEL MEMBERSHIP, APPOINTMENTS AND COMMITMENTS

*This call script will assist you in contacting establishments as a courtesy such as libraries, frequently visited restaurants, golf or bowling clubs, country clubs and art museums.*

#### CALL SCRIPT

Hello, my name is \_\_\_\_\_. I am calling to notify you of the death of my \_\_\_\_\_, \_\_\_\_\_. I am presently in the process of organizing and handling the deceased's business affairs and require your help. Specifically, I would like to:

- Cancel standing memberships and commitments
- Transfer membership to the following name: \_\_\_\_\_
- Request refund due to the estate
- Other: \_\_\_\_\_

Can you please inform me of when I can arrange a time to come in and collect the records or if you can send them to me via email?



# OUTSIDE COMMITMENTS

## TASK 3: CONTACT PERIODICAL SUBSCRIPTIONS

### COMMUNICATION TYPE: PHONE CALL

#### REFERENCE INFORMATION

Date: \_\_\_\_\_

Deceased's Date of Birth: \_\_\_\_\_

Contact's Name: \_\_\_\_\_

Phone Number: \_\_\_\_\_

#### CALL SUBJECT: CANCEL MEMBERSHIP, APPOINTMENTS AND COMMITMENTS

*This call script will assist you in contacting periodicals (newspapers, magazines, newsletters) with whom the deceased had a subscription. You will want to cancel the subscription if appropriate and coordinate any refund due to the estate. Or, you may change the billing and/or mailing addresses.*

*The U.S. Postal Service will forward magazines (via a change-of-address form) for 60 days. **One Switch** will permanently forward residential magazine subscriptions at no cost. Call **One Switch** toll-free at 1-888-255-7982.*

#### CALL SCRIPT

Hello, my name is \_\_\_\_\_. I am calling to notify you of the death of my \_\_\_\_\_, \_\_\_\_\_. I am presently in the process of organizing and handling the deceased's business affairs and will need your help. Specifically, I would like to:

- Cancel standing memberships and commitments
- Transfer subscriptions to the following name: \_\_\_\_\_
- Request refund due to the estate
- Other: \_\_\_\_\_



# OUTSIDE COMMITMENTS

## TASK 4: CONTACT SERVICE LEAGUES

### COMMUNICATION TYPE: PHONE CALL

#### REFERENCE INFORMATION

Date: \_\_\_\_\_

Deceased's Date of Birth: \_\_\_\_\_

Contact's Name: \_\_\_\_\_

Phone Number: \_\_\_\_\_

### CALL SUBJECT: CANCEL SUBSCRIPTIONS, CHANGE MAILING ADDRESS

*This call page will assist you in contacting those who the deceased has regularly scheduled appointments or visits with.*

#### CALL SCRIPT

Hello, my name is \_\_\_\_\_. I am calling to notify you of the death of my \_\_\_\_\_, \_\_\_\_\_ who passed away on \_\_\_\_\_.

I am presently in the process of organizing and handling the deceased's business affairs and want to let your group be aware of their death. Specifically, I would like to:

- Cancel standing memberships and commitments
- Transfer subscriptions to the following name: \_\_\_\_\_
- Request refund due to the estate
- Remove deceased from mailing list
- Provide tax letter detailing the deceased's contributions
- Provide account status of deceased's gift or pledge

If you have any questions or require any additional information, please do not hesitate to contact me at \_\_\_\_\_, or the following address:

Name: \_\_\_\_\_

Address: \_\_\_\_\_

City, State, Zip Code: \_\_\_\_\_



# SERVICES AND PROVIDERS

## TASK 1: CONTACT PLACE(S) OF WORSHIP

### COMMUNICATION TYPE: PHONE CALL

#### REFERENCE INFORMATION

Date: \_\_\_\_\_

Contact's Name: \_\_\_\_\_

Phone Number: \_\_\_\_\_

#### CALL SUBJECT: NOTIFYING RELIGIOUS ORGANIZATIONS OF DEATH

*You will want to contact the deceased's synagogue, spiritual advisor or place of worship to notify them about their death, if they haven't already been contacted.*

#### CALL SCRIPT

Hello, my name is \_\_\_\_\_. I am calling to notify you of the death of my \_\_\_\_\_, \_\_\_\_\_. I am presently in the process of notifying all organizations my \_\_\_\_\_ was part of.

I'd like to remind you that if my \_\_\_\_\_ was involved in any leadership or volunteer roles that you will need to remove their name from the list and will need to fill the now open position.

If it is available, I would like their death to be noted in the monthly newsletter or any written communication for congregants or friends to be notified if they have not received the news as of yet.

A donation in the memory of my \_\_\_\_\_ can be sent to \_\_\_\_\_.

The funeral service will be held at \_\_\_\_\_ on \_\_\_\_\_

at/from \_\_\_\_\_. The shiva will be held at \_\_\_\_\_ on

\_\_\_\_\_ at \_\_\_\_\_ (Note multiple shiva dates/times).



# SERVICES AND PROVIDERS

## TASK 2: CONTACT UTILITY COMPANIES

### REFERENCE INFORMATION

#### TELEPHONE COMPANY

Date: \_\_\_\_\_

Company Name: \_\_\_\_\_

Account Number: \_\_\_\_\_

Contact's Name: \_\_\_\_\_

Phone Number: \_\_\_\_\_

#### ELECTRIC COMPANY

Date: \_\_\_\_\_

Company Name: \_\_\_\_\_

Account Number: \_\_\_\_\_

Contact's Name: \_\_\_\_\_

Phone Number: \_\_\_\_\_

#### HEAT

Date: \_\_\_\_\_

Company Name: \_\_\_\_\_

Account Number: \_\_\_\_\_

Contact's Name: \_\_\_\_\_

Phone Number: \_\_\_\_\_





# SERVICES AND PROVIDERS

## TASK 2: CONTACT UTILITY COMPANIES

### CABLE/INTERNET COMPANY

Date: \_\_\_\_\_

Company Name: \_\_\_\_\_

Account Number: \_\_\_\_\_

Contact's Name: \_\_\_\_\_

Phone Number: \_\_\_\_\_

### CELL PHONE PROVIDER

Date: \_\_\_\_\_

Company Name: \_\_\_\_\_

Account Number: \_\_\_\_\_

Contact's Name: \_\_\_\_\_

Phone Number: \_\_\_\_\_

### WATER AND SEWER COMPANY

Date: \_\_\_\_\_

Company Name: \_\_\_\_\_

Account Number: \_\_\_\_\_

Contact's Name: \_\_\_\_\_

Phone Number: \_\_\_\_\_



# SERVICES AND PROVIDERS

## TASK 2: CONTACT UTILITY COMPANIES

### WASTE MANAGEMENT

Date: \_\_\_\_\_

Company Name: \_\_\_\_\_

Account Number: \_\_\_\_\_

Contact's Name: \_\_\_\_\_

Phone Number: \_\_\_\_\_

### SECURITY ALARM COMPANY

Date: \_\_\_\_\_

Company Name: \_\_\_\_\_

Account Number: \_\_\_\_\_

Contact's Name: \_\_\_\_\_

Phone Number: \_\_\_\_\_



# SERVICES AND PROVIDERS

## TASK 2: CONTACT UTILITY COMPANIES

### COMMUNICATION TYPE: PHONE CALL

#### CALL SUBJECT: CANCEL SERVICE OR CHANGE BILLING STATUS

*This call script will assist you in contacting utility companies (telephone, gas, electric, water/sewer, cable television, internet provider) with whom the deceased had contracted services. You will want to inquire about canceling service, transferring the account to another name, or changing the billing address. In addition, confirm account status and payment plans.*

#### CALL SCRIPT

Hello, my name is \_\_\_\_\_. I am calling to notify your company of the death of my \_\_\_\_\_, \_\_\_\_\_. I am presently in the process of organizing and handling the deceased's business affairs and will need your help reconciling the account. Specifically, I would like to:

- Cancel services as of: \_\_\_\_\_
- Remove the deceased's name from the account
- Add the following names to the account: \_\_\_\_\_
- Change the billing address to: \_\_\_\_\_
- Please send an updated statement detailing account balances or refunds to the estate



# SERVICES AND PROVIDERS

## TASK 3: CONTACT POSTAL SERVICE

**COMMUNICATION TYPE:** PHONE CALL

REFERENCE INFORMATION

Date: \_\_\_\_\_

Locate your postal office at [www.usps.com](http://www.usps.com)

### **CALL SUBJECT:** CHANGE MAILING ADDRESS/CANCEL OR EMPTY POST OFFICE BOX

*It may be necessary to forward mail from the deceased's mailing address and/or obtain items from a Post Office Box. The U.S. Postal Service website ([www.usps.com](http://www.usps.com)) provides an online change-of-address form and a post office locator.*

*To change a mailing address online, click the "Change Address" link on the main page. You may be charged a fee so you will need a credit or debit card handy for this service. However, you may also visit any post office and complete a change-of-address form. This is free of charge.*

*In addition, the website provides a post office locator. Click the "Find USPS Locations" link on the main page. This will provide an option to search post offices by street or zip code. The results will include local telephone numbers for the offices.*

***Obtaining entry to a Post Office Box for the deceased requires proof of Power of Attorney or a copy of the Will and identification for the executor. You must present these documents to the Post Office to obtain entry.***

### **CALL SCRIPT**

Hello, my name is \_\_\_\_\_. I am calling to notify you of the death of my \_\_\_\_\_, \_\_\_\_\_. I am presently in the process of organizing and handling the deceased's business affairs and will need your help with forwarding mail and closing any Post Office Boxes.

I would like to come down to the local post office to do this, but want to confirm what is needed from me to forward the mail and close any Post Office Boxes.



# SERVICES AND PROVIDERS

## TASK 4: CONTACT SERVICE PROVIDERS

### COMMUNICATION TYPE: PHONE CALL

#### REFERENCE INFORMATION

Date: \_\_\_\_\_

Deceased's Social Security Number: \_\_\_\_\_

Deceased Account Number: \_\_\_\_\_

Contact's Name: \_\_\_\_\_

Phone Number: \_\_\_\_\_

#### CALL SUBJECT: CANCEL APPOINTMENTS WITH SERVICE PROVIDERS

*This call script will assist you in contacting those who the deceased has regularly scheduled appointments or visits with (See appendix for full list: barber, hairstylist, nail salon, spa, fitness center, masseuse).*

#### CALL SCRIPT

Hello, my name is \_\_\_\_\_. I am calling to notify your company of the death of my \_\_\_\_\_, \_\_\_\_\_. I am presently in the process of organizing and handling the deceased's business affairs and will need your help reconciling the account. Specifically, I would like to:

- Cancel standing reservations, appointments, or membership
- Transfer memberships to the following name: \_\_\_\_\_
- Request refund due to estate
- Other: \_\_\_\_\_



# SERVICES AND PROVIDERS

## TASK 5: MAINTENANCE PROVIDERS

### COMMUNICATION TYPE: PHONE CALL

#### REFERENCE INFORMATION

Date: \_\_\_\_\_

Deceased's Social Security Number: \_\_\_\_\_

Deceased Account Number: \_\_\_\_\_

Contact's Name: \_\_\_\_\_

Phone Number: \_\_\_\_\_

#### CALL SUBJECT: CANCEL APPOINTMENTS WITH SERVICE PROVIDERS

*This call script will assist you in contacting those who the deceased has regularly scheduled appointments or visits with (See appendix for full list: barber, hairstylist, nail salon, spa, fitness center, masseuse).*

#### CALL SCRIPT

Hello, my name is \_\_\_\_\_. I am calling to notify your company of the death of my \_\_\_\_\_, \_\_\_\_\_. I am presently in the process of organizing and handling the deceased's business affairs and will need your help reconciling the account. Specifically, I would like to:

- Cancel standing reservations, appointments, or membership
- Transfer memberships to the following name: \_\_\_\_\_
- Request refund due to estate
- Other: \_\_\_\_\_



# SERVICE PROVIDERS LISTING

## BARBER

Date: \_\_\_\_\_

Company Name: \_\_\_\_\_

Account Number: \_\_\_\_\_

Contact's Name: \_\_\_\_\_

Phone Number: \_\_\_\_\_

## HAIRSTYLIST

Date: \_\_\_\_\_

Company Name: \_\_\_\_\_

Account Number: \_\_\_\_\_

Contact's Name: \_\_\_\_\_

Phone Number: \_\_\_\_\_

## NAIL SALON

Date: \_\_\_\_\_

Company Name: \_\_\_\_\_

Account Number: \_\_\_\_\_

Contact's Name: \_\_\_\_\_

Phone Number: \_\_\_\_\_



# SERVICE PROVIDERS LISTING

SPA

Date: \_\_\_\_\_

Company Name: \_\_\_\_\_

Account Number: \_\_\_\_\_

Contact's Name: \_\_\_\_\_

Phone Number: \_\_\_\_\_

FITNESS CENTER

Date: \_\_\_\_\_

Company Name: \_\_\_\_\_

Account Number: \_\_\_\_\_

Contact's Name: \_\_\_\_\_

Phone Number: \_\_\_\_\_

MASSEUSE

Date: \_\_\_\_\_

Company Name: \_\_\_\_\_

Account Number: \_\_\_\_\_

Contact's Name: \_\_\_\_\_

Phone Number: \_\_\_\_\_





# SERVICE PROVIDERS LISTING

## PET SITTER

Date: \_\_\_\_\_

Company Name: \_\_\_\_\_

Account Number: \_\_\_\_\_

Contact's Name: \_\_\_\_\_

Phone Number: \_\_\_\_\_

## ADULT DAY CARE

Date: \_\_\_\_\_

Company Name: \_\_\_\_\_

Account Number: \_\_\_\_\_

Contact's Name: \_\_\_\_\_

Phone Number: \_\_\_\_\_

## CHILD CARE

Date: \_\_\_\_\_

Company Name: \_\_\_\_\_

Account Number: \_\_\_\_\_

Contact's Name: \_\_\_\_\_

Phone Number: \_\_\_\_\_



# SERVICE PROVIDERS LISTING

## LAWN AND SPRINKLER MAINTENANCE

Date: \_\_\_\_\_

Company Name: \_\_\_\_\_

Account Number: \_\_\_\_\_

Contact's Name: \_\_\_\_\_

Phone Number: \_\_\_\_\_

## SNOW REMOVAL

Date: \_\_\_\_\_

Company Name: \_\_\_\_\_

Account Number: \_\_\_\_\_

Contact's Name: \_\_\_\_\_

Phone Number: \_\_\_\_\_

## POOL MAINTENANCE

Date: \_\_\_\_\_

Company Name: \_\_\_\_\_

Account Number: \_\_\_\_\_

Contact's Name: \_\_\_\_\_

Phone Number: \_\_\_\_\_



# SERVICE PROVIDERS LISTING



## PEST CONTROL

Date: \_\_\_\_\_

Company Name: \_\_\_\_\_

Account Number: \_\_\_\_\_

Contact's Name: \_\_\_\_\_

Phone Number: \_\_\_\_\_

## DELIVERY SERVICE

Date: \_\_\_\_\_

Company Name: \_\_\_\_\_

Account Number: \_\_\_\_\_

Contact's Name: \_\_\_\_\_

Phone Number: \_\_\_\_\_





## JEWISH FUNERALS

Jewish-owned and operated since 2001

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# APPENDIX

FULL LETTERS TO MAIL  
SERVICE AND MAINTENANCE PROVIDERS LISTINGS

RE: Notification of Death

To Whom It May Concern:

I am writing to report the death of my \_\_\_\_\_, \_\_\_\_\_ who passed away on \_\_\_\_\_. Specifically, I am writing in reference to the following credit card:

Credit card number: \_\_\_\_\_ Expiration Date: \_\_\_\_\_

I would ask you to please:

- Cancel the card
- Remove the deceased's name from the account and reissue the card in my name
- Change the billing address to:

Name of responsible party: \_\_\_\_\_

Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

In addition, please advise me:

- As to whether the account balance is covered by insurance
- With regard to the balance on this account as of the Date of Death

If you have questions or require any additional information, please do not hesitate to contact me at \_\_\_\_\_, or the address above.

Sincerely,

\_\_\_\_\_

RE: Notification of Employee Death

To Whom It May Concern:

I am writing to report the death of my \_\_\_\_\_, \_\_\_\_\_ who passed away on \_\_\_\_\_. I am handling the business affairs and require your assistance. I have attached the following documents for your reference:

- Death Certificate
- Deceased's Employee ID Number: \_\_\_\_\_

In return, could you please send me the following information and statements:

- Pension or retirement plans
- Gross amount of salary paid since the beginning of the current year
- Life insurance coverage due
- Company-owned items to be returned (computer, office keys, car, etc.)
- Other: \_\_\_\_\_

Also, could you please contact me regarding the removal of the deceased's personal belongings from the workplace. If you have questions or require any additional information, please do not hesitate to contact me at \_\_\_\_\_, or the address above.

Sincerely,

\_\_\_\_\_