You don't have to do it alone. Having a trusted team makes navigating financial decisions **easier and less overwhelming**.

Surviving Spouse Checklist

Now

The first week

- [ ] Funeral/celebration of life arrangements
- [ ] Contact social security, if applicable
- [ ] Notify spouse's employer, if applicable
- [ ] Locate will and/or trust

Peace of mind matters. Nearly 80% of people say that being financially organized **reduces their day-to-day stress**.

Confidence grows with guidance. Those who work with a financial advisor are significantly more likely to **feel secure** about their financial future.

Soon

Weeks two to four

- [ ] Obtain death certificate (10-25 copies)
- [ ] Life insurance claims
- [ ] Initiate probate process if necessary
- [ ] Review bills and income needs; develop budget
- [ ] Contact spouse's employer regarding benefits, if applicable
- [ ] Notify credit bureaus (Equifax, TransUnion and Experian)
- [ ] Transition spouse's individual banking, retirement and investment accounts, if applicable

Later

One to six months

- [ ] Update beneficiaries on retirement, brokerage and pension accounts
- [ ] Update will and/or trust, POAs
- [ ] Update titles, registrations and deeds (cars, home(s), bank accounts, investment accounts, credit card(s), utilities, insurance, etc.)
- [ ] Create/update your life and legacy organizer

People to contact for assistance:

- Financial advisor
- Estate attorney
- Tax preparer
- Your bank
- Social Security Administration

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