


# BENEFICIARY CHECKLIST: *What to Handle First*

- Contact Family Attorney
- Contact Life Insurance Representative
- Contact Trust Officer
- Contact Deceased's Employer
- Contact Accountant
- Contact Social Security Administration - 1-800-772-1213 / Mon-Fri 8:00 - 7:00pm/ ask about survivor benefits
- Contact Veteran's Administration - 1-800-827-1000 Mon-Fri 8:00am - 9:00pm ET  
You will need the Veteran's full name and social security number (or VA claim number), date of birth and date of death, branch of military service, copies of the death certificate and discharge papers (DD214)
- Contact Office of Personnel Management (Civil Service Commission) - this contact is necessary if the deceased was a federal civilian employee, was covered under CSRS or FERS, or had a civil service pension or survivor benefits.  
1-888 - 767-6738 Mon-Fri 7:40 am - 5:00 pm ET
- Contact Deceased's Member Organizations
- Obtain Death Certificate - request multiple certificates, at least 5. These are used for many contacts
- Obtain Birth Certificate
- Obtain Marriage Certificate
- Obtain Will and Trust Agreements
- Obtain Letter of Administration/Guardianship
- Obtain Current Bills

 (720) 255-3595

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