



**Guide for Families to ensure important information is available to survivors.
Actions recommended prior to and following the death of a Family Member
August 2020**

To Retirees and their Spouses, Survivors and Beneficiaries:

The following is provided by the Insurance Committee of the National Chrysler Retirement Organization (NCRO). It is intended as general information that it is not applicable to only the benefits provided by Chrysler/FCA for its retirees, their spouse, survivors or beneficiaries. This Guide is not intended as legal advice on how to manage an estate. Information regarding benefits provided by Chrysler/FCA are covered in a separate Guide.

This Guide is intended to recommend information that everyone should make available to those that may need to refer to it.

This listing may not be complete for everyone, but is intended to cover as many items as occurred to the Insurance Committee. For a more detailed listing there are books and publications on this subject. One that has been recommended by one of our NCRO Board members, is called Checklist For My Family, A Guide to My History, Financial Plans, and Final Wishes written by Sally Balch Hurme an elder care attorney.

Jay Kuhnie, President NCRO August 2020

The following information should be kept in a binder or folder and secured.

- Personal data to include names, addresses, birth dates, social security numbers and Medicare numbers for yourself as the retiree and for family members.
- User Names and Passwords for accessing financial, medical and other information files for online accounts using the internet.

- **Contact Information for:**

Doctors	Bank(s) and/or Credit Union(s)
Lawyers	Mortgage Company
Insurance Agent(s)	Pension/Annuity Provider
Investment Advisors/Brokers	Healthcare, Life, LTC Ins. Providers
Investment Account Holders	Care Facility being lived in
Religious Contact	Charities
Social Security	Funeral Home or alternative
Former Employer or designated Administrators of Company Benefits	Cemetery
Close friends and family	Medicare
Veterans Administration, if applicable	Medications/Pharmacies
	Credit Card Companies

- **Documents for:**

Social Security	Medicare/Medicaid
Wills	Trusts
Powers of Attorney for:	Medical History
○ General	Investments
○ Medical	Loans/Mortgage
○ HIPAA Authority	Pensions/Annuities
Insurance Certificates	Tax Returns
Life, Home, Auto, Medical	User Names and Passwords
Military Service	Burial Plots/Cremation Wishes
Marriage Certificate	Birth Certificate(s)
Passport(s)	Adoption Documents
Collectibles	Instructions for Funeral preferences

In the event of the death of someone, the following is general information on who should be contacted and on steps to be taken.

The contact listing below is dependent upon whether you are the retiree, the spouse or the beneficiaries. It is intended as a checklist and may not include everything for everyone's circumstances. Before you take any actions you may want to contact your lawyer or investment advisor. You should also coordinate this with other survivors.

- Funeral Home and/or Cemetery - Can be a valuable resource due to their experience and ability to guide you through this difficult time. They can initiate requests for death certificates.
- Close friends and family
- Caregiver(s) for dependents and/or pets
- Social Security Administration to cancel/change Social Security payments and initiate the process for the Social Security Death Benefit
- Investigate surviving spouse and/or other dependent options with Social Security
- Medicare and/or Medicaid
- Pension provider or Annuity provider if applicable
- Health Insurers (including Drug, Dental and Vision insurers, as applicable)
- Lawyer for wills and trusts and any property issues
- Life Insurance Company(s)
- Banks and Mortgage Company (Do not close Bank account(s) immediately)
- Credit card companies to close or change card registration, if applicable
- Veterans Administration, if applicable (There may be a death benefit)
- Department of Motor Vehicles to cancel the deceased person's driver's license or State Identification Card

- U.S. Postal Service to forward mail delivery, if applicable
- Financial Advisors
- The deceased person's doctor(s)
- Update all records to remove deceased person (i.e. home title, car title, utilities, joint bank accounts, mortgages, leases, credit cards, etc.)
- Monitor the bank account(s) and credit cards for fraud

Disclaimer

This document was prepared by the National Chrysler Retirement Organization's (NCRO) Insurance Committee and is intended as a guide providing recommendations regarding information that everyone should have available. While every effort was made to provide accurate and complete information at the time it was prepared, the NCRO makes no warranties concerning the information, either express or implied, including but not limited to implied warranties of merchantability and fitness for a particular purpose. August, 2020