

DECEASED ACCOUNT-CLOSING & NOTIFICATION TRACKER

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DECEASED ACCOUNT-CLOSING & NOTIFICATION TRACKER

Use this tracker to notify the right parties in order and record each step. Keep it with the death certificates and estate paperwork.

1. Key Information

Deceased full legal name / date of death: _____

Date of birth / SSN reference (store securely): _____

Executor / personal representative + authority (letters testamentary?): _____

Certified death certificates ordered (aim for 10+): _____

2. Priority Notifications (do these FIRST)

- ☐ Social Security Administration (confirm the funeral home reported it)
- ☐ Equifax — request "deceased, do not issue credit" flag + death certificate
- ☐ Experian — same request + death certificate
- ☐ TransUnion — same request + death certificate

3. Financial Accounts

Bank / credit union accounts (list + status): _____

Credit cards (issuer + cancelled?): _____

Loans / mortgages (lender + notified?): _____

4. Government & Benefits

- ☐ IRS + state tax agency (final return; helps prevent refund fraud)
- ☐ DMV — cancel the driver license
- ☐ Medicare / Medicaid / VA (if applicable)

Pensions / insurers / benefit providers: _____

5. Subscriptions & Online

Recurring subscriptions cancelled: _____

Email / social accounts memorialized or closed: _____

6. Ongoing Watch (3-6 months)

- ☐ Watch for new-account mail, a rejected tax return, collector calls
- ☐ Shred sensitive mail; consider an identity-monitoring service

INSTRUCTIONS FOR USE

Complete the bracketed fields, delete anything that does not apply, sign where required, and keep with your records. This template is provided for informational purposes only and does not constitute legal advice. Laws vary by state and change over time. Have an attorney review your completed document before relying on it. ClearLegalTips.com is not a law firm.