# TO DO LIST FOR SPOUSES

Often Social Security, pensions, annuity payments, and IRA disbursements, etc., may change with the death of a spouse.

**Be sure to keep the spouse's cell phone safe for any two-step verification texts the banks may require.**

Wait several months to close email accounts as you may have forgotten an old investment and then need the email account for the two-step verification process.

**If you move when your spouse passes – be sure to do a "change of address" on all accounts.**

## IF THE HUSBAND PASSES FIRST - THE SPOUSE MAY NEED TO KNOW:

EXAMPLES: Fill the golf cart batteries on... Change the furnace filter on... Change the oil every… Call Tom if the weeds get bad. Call Dick if the AC stops. Call Harry if the you need a light bulb changed.

## IF THE WIFE PASSES FIRST – THE SPOUSE MAY NEED TO KNOW:

EXAMPLES: Don't forget I hide my good jewelry in my winter coat pocket in front closet when we go on trips. Run toothbrushes in dishwasher... Check on Wilma every Thursday… Take Dino for grooming every…

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Courtesy of the Sun City Center Computer Club for organizational purposes only.

**Not a legal document.**

**(DON'T LIST ACCOUNT NUMBERS OR PASSWORDS HERE.)**

## Do your research on how accounts will change if a spouse dies.

(example: social security checks or veterans benefits or pension payments)

## Make notes here: