

PPS EXTENDED CARE PROGRAM™

As part of the PPS Extended Care Program™ Pre-Planning Solutions, Inc. (PPS) offers practical assistance for your loved ones immediately following a death.

The vital information in this portfolio must be completed for us to efficiently assist your loved ones at the time of need. This information will allow PPS or one of its affiliates to facilitate the process of taking care of the 12 Steps below that will need to be handled in a timely fashion.

A Certified Copy of the Death Certificate is required to complete each transaction of business however, it is not required to request the claim forms necessary to file for benefits.

1. Set Appointments with Key Advisors

- Estate Planning Attorney
- Financial Advisor
- CPA and /or Tax Preparer

2. Notify Financial Institutions and Credit Card Companies

3. Notify Social Security (800) 772-1213

- Request a Phone or In Person Appointment – Discuss Survivors Benefits

4. Notify Veteran Administration Office (800) 827-1000

- Order Presidential Certificate via the VA Form 40-0247 - Must Submit Copy of DD214
- Inquire About Life Insurance Policy with the VA

5. Notify Employer

- Request Final Paycheck and Inquire about Possible Vested Vacation Time Accrued
- Inquire About Employee Life Insurance Policy or Union Death Benefits
- File for Pension or Annuity Benefits

6. Notify Life Insurance Agent(s) or Companies

- Request & File Insurance Claim Forms
- Cancel Policies that are Not Needed such as Medical Insurance
- Change “Named Insured” on Active Policies such as Auto Insurance
- Change Beneficiary Name on Active Policies for All Surviving Loved Ones

7. Notify Post Office

- Request Stop or Redirecting Mail at the Post Office
- Remove Name from Advertisers’ Mailing Lists - Deceased Do Not Contact List - DMA.org

8. Notify Department of Motor Vehicles (DMV)

- Clear Driver’s License or Identification Card
- Return Disabled Person(DP) Parking Placard – Must be returned within 60 Days
- Transfer of Owner Vehicle(s) and Maintain Registration on Vehicle(s) until transferred

9. Notify Utility Companies

- Water & Gas & Electric
- Phone(s) and/or Cable Company

10. Cancel Subscriptions

- Magazines
- Memberships

11. Notify Doctors & Dentist

12. Provide Grief Support Options