Gather Before You Make Calls

A simple prep sheet for the documents, account details, and notes that can make difficult calls a little easier to manage.

Making calls after a loss can feel harder than the call itself. Before you pick up the phone, it helps to have the most common information in one place: names, dates, account numbers, certificates, identification, and a simple way to track who you spoke with and what they told you.

You may not need every item for every call, and you may not have everything yet. That is okay. This guide is meant to help you prepare what you can, reduce repeat searching, and give your tired brain one less job to do.

Keep Handy for Most Calls

- [ ] Certified death certificate, if already available
- [ ] Your photo ID
- [ ] Your Social Security number
- [ ] His Social Security number
- [ ] Date of birth; date of death
- [ ] Marriage certificate, if you are the spouse
- [ ] Your current mailing address
- [ ] Your phone number and email address
- [ ] Notebook or call log
- [ ] Pen
- [ ] Folder for documents received or requested

Account-Specific Information

- [ ] Account number
- [ ] Policy number
- [ ] Loan number
- [ ] Member ID
- [ ] Claim number, if already opened
- [ ] Online login information, if available
- [ ] Most recent statement or bill
- [ ] Name on the account
- [ ] Joint account holder information, if applicable

Questions to Ask During the Call

- [ ] What documents do you need from me?
- [ ] Do you need an original certified death certificate or a copy?
- [ ] Will the death certificate be returned?
- [ ] Is there a claim or change form?
- [ ] Can you mail or emai the form?
- [ ] Is there a deadline?
- [ ] What happens to autopay?
- [ ] Should I keep making payments?
- [ ] Is there a confirmation number for this call?
- [ ] Who did I speak with today?

Company/Agency:	
Phone #:	Date Called:
Person spoke to:	
Documents requested:	
Next steps:	
Deadline:	Confirmation #:
Follow-up appointment:	