

Government Benefits and Assistance

If you receive any payments from the government, your executor needs to know.

Social Security retirement benefits. Social Security Disability Insurance (SSDI). Supplemental Security Income (SSI). Veterans' benefits. State disability benefits. These payments stop when you die, and your executor needs to notify the relevant agencies.

In some cases, payments received after your death need to be paid back. In other cases, there might be final entitlements (like bereavement payments for your spouse).

This section helps your executor know what you're receiving and who to contact.

What government benefits might you receive?

Common government payments in the United States include:

Social Security retirement benefits. If you're over retirement age, you receive Social Security retirement benefits from the Social Security Administration. When you die, your executor must notify the Social Security Administration immediately. Any payments received after your date of death must be repaid.

Social Security Disability Insurance (SSDI). For people with a permanent disability who can't work. Same rules as Social Security retirement benefits - must notify the Social Security Administration, repay any payments received after death.

Supplemental Security Income (SSI). If you have limited income and resources and are aged, blind, or disabled. Stops when you die.

Veterans' benefits. If you served in the military, you or your survivors may be eligible for benefits from the Department of Veterans Affairs. The available benefits and how to claim them are set by the VA and can change, so your executor or spouse should check current eligibility directly with the VA.

State disability benefits. If you receive state disability support (such as SSI, SSDI, or state disability programs), your executor needs to notify the relevant state agency.

Child Tax Credit (CTC). If you're receiving Child Tax Credit (CTC) for dependent children, this needs to be updated or transferred if your partner will continue caring for the children.

Unemployment Insurance (UI) or other income support. If you're receiving unemployment benefits or other income support, these stop when you die.

What about bereavement payments?

After your death, your spouse or partner may be eligible for survivor benefits from the Social Security Administration. What's available depends on their situation and your work record, so they should contact the SSA at 1-800-772-1213 to find out exactly what they can claim.

Your executor should advise your spouse to contact the Social Security Administration to see what they're entitled to.

WHY THIS MATTERS

If your executor doesn't notify government agencies promptly, payments will keep being deposited into your bank account. Those payments will need to be repaid, which can be administratively painful.

On the flip side, if your spouse is entitled to bereavement payments and doesn't know to claim them, they'll miss out.

Write down what you're receiving so your executor knows what to do.

Your Government Benefits and Assistance

Every government payment and card, so your executor can notify the right agencies and stop payments.

SOCIAL SECURITY PAYMENTS

DO YOU RECEIVE ANY PAYMENTS FROM THE SOCIAL SECURITY ADMINISTRATION?

Tick one: Yes (details below) / No (skip to next section)

IF YES, WHICH PAYMENTS DO YOU RECEIVE?

· SOCIAL SECURITY RETIREMENT BENEFITS

· SOCIAL SECURITY DISABILITY INSURANCE (SSDI)

· SUPPLEMENTAL SECURITY INCOME (SSI)

· UNEMPLOYMENT INSURANCE (UI) PAYMENT

· CHILD TAX CREDIT (CTC)

· OTHER SOCIAL SECURITY ADMINISTRATION PAYMENT

WHICH BANK ACCOUNT ARE SOCIAL SECURITY PAYMENTS DEPOSITED IN?

rows: Bank / Account

DEPARTMENT OF VETERANS AFFAIRS (VA) BENEFITS

DO YOU RECEIVE ANY BENEFITS FROM DEPARTMENT OF VETERANS AFFAIRS (VA)?

Tick one: Yes (details below) / No

Your Government Benefits and Assistance (cont.)

· VA DISABILITY COMPENSATION

· VETERANS' PENSION

· VA SURVIVORS PENSION

· OTHER VA PAYMENT

VA FILE NUMBER

WHICH BANK ACCOUNT ARE VA PAYMENTS DEPOSITED INTO?

STATE DISABILITY BENEFITS

ARE YOU A PARTICIPANT IN THE STATE DISABILITY BENEFITS?

Tick one: Yes (details below) / No

PROGRAM NAME

If yes:

CASE/FILE NUMBER

PHONE

ANNUAL FUNDING AMOUNT

OTHER GOVERNMENT ASSISTANCE

DO YOU RECEIVE ANY OTHER GOVERNMENT ASSISTANCE OR SUBSIDIES?

Your Government Benefits and Assistance (cont.)

Tick one: Yes (details below) / No

TYPE OF ASSISTANCE

If yes:

AMOUNT/BENEFIT

CONTACT AGENCY

INFORMATION FOR YOUR SPOUSE/PARTNER

IF YOU HAVE A SPOUSE OR PARTNER, THEY SHOULD CONTACT THE SOCIAL SECURITY ADMINISTRATION AFTER YOUR DEATH TO

bullets: - Report your death - Cancel your payments - Ask about bereavement payments they might be entitled to - Update their own payments (if they receive any). Social Security Administration: 1-800-772-1213

NOTES (ANYTHING ELSE ABOUT GOVERNMENT BENEFITS)