

Notification Templates

After someone dies, you need to notify dozens of organizations.

Banks. Retirement plan administrators. Social Security. Insurance companies. Employers. Tax authorities. Utilities. Each one needs to be told formally, usually in writing.

This section provides letter templates you can adapt and use.

These templates are starting points. You'll need to customize them with specific details (names, account numbers, dates). But they give you the structure and wording to make notifications easier.

How to use these templates:

1. Choose the template that matches who you're notifying
2. Fill in the bracketed information with your details
3. Attach a certified copy of the death certificate
4. Keep a copy of every letter you send
5. Follow up if you don't hear back within 2 weeks

Let's make notifications easier.

NOTIFICATION TEMPLATES FOR EXECUTORS

TEMPLATE 1: NOTIFICATION TO BANK

[Your Name]
[Your Address]
[Your Phone]
[Your Email]

[Date]

[Bank Name]
[Branch Address]

To Whom It May Concern,

Re: Notification of Death - [Deceased's Full Name]

I am writing to notify you of the death of [Deceased's Full Name], who passed away on [Date of Death].

[Deceased's Name] held the following account(s) with your organization:

- Account Name: [Account Name]
- Account Number: [Account Number]
- routing number: [routing number]

I am the executor of the estate of [Deceased's Name]. A certified copy of the death certificate is enclosed.

Please freeze the account(s) and advise me of the balance(s) as at the date of death. I will provide a copy of the Letters Testamentary once it has been issued by the Probate court.

Please also advise if there are any:

- Direct debits or automatic payments linked to this account
- Joint account holders
- Loans, credit cards, or other products in the deceased's name

I would appreciate your response within 14 days.

Sincerely,

[Your Signature]
[Your Printed Name]
Executor for the Estate of [Deceased's Full Name]
Enclosures: Certified copy of death certificate

TEMPLATE 2: NOTIFICATION TO RETIREMENT SAVINGS FUND

[Your Name]
[Your Address]
[Your Phone]
[Your Email]

[Date]

[Retirement savings Fund Name]
[Retirement savings Fund Address]

To Whom It May Concern,

Re: Death Benefit Claim - [Deceased's Full Name]
Member Number: [Member Number]

I am writing to notify you of the death of [Deceased's Full Name], who passed away on [Date of Death].

[Deceased's Name] was a member of your retirement savings fund. A certified copy of the death certificate is enclosed.

Please send me:

1. A death benefit claim form
2. Details of the current retirement savings balance
3. Information about any beneficiary designation on file
4. Details of any insurance held through the fund (life insurance, TOTAL DISABILITY, disability insurance)

I am the executor of the estate. Please advise what documentation you require to process the death benefit claim.

I would appreciate your response within 14 days.

Sincerely,

[Your Signature]
[Your Printed Name]
Executor for the Estate of [Deceased's Full Name]

Enclosures: Certified copy of death certificate

TEMPLATE 3: NOTIFICATION TO Social Security

[Your Name]
[Your Address]
[Your Phone]

[Date]

Social Security
[Local Social Security Office Address]

To Whom It May Concern,

Re: Notification of Death - [Deceased's Full Name]
Social Security Reference Number (SSN): [SSN]

I am writing to notify you of the death of [Deceased's Full Name], who passed away on [Date of Death].

[Deceased's Name] was receiving the following payment(s):
- [Payment Type, e.g., Social Security, Caregiver benefits]

A certified copy of the death certificate is enclosed.

Please cease all payments with effect from [Date of Death] and advise if any payments received after this date need to be repaid.

[If applicable: The deceased's spouse, [Spouse's Name], SSN [Spouse's SSN], may be eligible for bereavement payments. Please advise them of any entitlements.]

Please confirm receipt of this notification and advise of any further action required.

Sincerely,

[Your Signature]
[Your Printed Name]
Executor for the Estate of [Deceased's Full Name]

Enclosures: Certified copy of death certificate

TEMPLATE 4: NOTIFICATION TO EMPLOYER

[Your Name]
[Your Address]
[Your Phone]
[Your Email]

[Date]

[Employer Name]
[HR Department]
[Employer Address]

To Whom It May Concern,

Re: Notification of Death - [Deceased's Full Name]
Employee Number: [Employee Number]

I am writing to notify you of the death of [Deceased's Full Name], who was employed by your organization as [Job Title]. [He/She] passed away on [Date of Death].

A certified copy of the death certificate is enclosed.

As the executor of [Deceased's Name]'s estate, I request the following:

1. Final pay for any unpaid salary or wages
2. Payment of accrued paid time off (PTO) and any other owed leave
3. Details of any retirement savings contributions owing
4. Information about any life insurance or disability insurance policies through the employer
5. Details of any other entitlements (severance, bonuses, share options, etc.)

Please advise what documentation you require and the expected timeframe for payment of final entitlements.

Please send all correspondence to the address above.

Sincerely,

[Your Signature]
[Your Printed Name]
Executor for the Estate of [Deceased's Full Name]

Enclosures: Certified copy of death certificate

TEMPLATE 5: NOTIFICATION TO INSURANCE COMPANY

[Your Name]
[Your Address]
[Your Phone]
[Your Email]

[Date]

[Insurance Company Name]
[Claims Department]
[Insurance Company Address]

To Whom It May Concern,

Re: Life Insurance Death Claim - [Deceased's Full Name]
Policy Number: [Policy Number]

I am writing to notify you of the death of [Deceased's Full Name], the insured person under the above policy. [He/She] passed away on [Date of Death].

A certified copy of the death certificate is enclosed.

I am the executor of the estate of [Deceased's Name]. Please send me:

1. A claim form for the death benefit
2. Confirmation of the sum insured
3. Details of the nominated beneficiaries (if any)
4. A list of documents required to process the claim

Please advise the expected timeframe for processing this claim.

I would appreciate your response within 14 days.

Sincerely,

[Your Signature]
[Your Printed Name]
Executor for the Estate of [Deceased's Full Name]

Enclosures: Certified copy of death certificate

TEMPLATE 6: NOTIFICATION TO UTILITY PROVIDER

[Your Name]

[Your Address]

[Your Phone]

[Date]

[Utility Provider Name]

[Utility Provider Address]

To Whom It May Concern,

Re: Notification of Death and Account Closure - [Deceased's Full Name]

Account Number: [Account Number]

Service Address: [Service Address]

I am writing to notify you of the death of [Deceased's Full Name], who passed away on [Date of Death].

[Deceased's Name] held an account with your organization for [electricity/gas/water/internet] service at the above address.

Please:

1. Transfer the account to my name as executor until the property is sold

OR

2. Close the account as of [Date] and send a final bill to the address below

Please send the final account statement and any refund owing to:

[Your Name]

[Your Address]

Sincerely,

[Your Signature]

[Your Printed Name]

Executor for the Estate of [Deceased's Full Name]

TEMPLATE 7: NOTIFICATION TO COUNTY/CITY PROPERTY TAX OFFICE

[Your Name]
[Your Address]
[Your Phone]

[Date]

[Tax Authority Name]
Property Tax Department
[Tax Authority Address]

To Whom It May Concern,

Re: Notification of Death - [Deceased's Full Name]
Property Address: [Property Address]
Parcel Number (APN): [Parcel Number (APN)]

I am writing to notify you of the death of [Deceased's Full Name], who was the owner of the above property. [He/She] passed away on [Date of Death].

I am the executor of the estate. A certified copy of the death certificate is enclosed.

Please update your records and send all future correspondence regarding this property to:
[Your Name]
[Your Address]

Please advise if there are any outstanding property taxes owing.

Sincerely,

[Your Signature]
[Your Printed Name]
Executor for the Estate of [Deceased's Full Name]

Enclosures: Certified copy of death certificate

TEMPLATE 8: GENERAL NOTIFICATION LETTER

[Your Name]
[Your Address]
[Your Phone]
[Your Email]

[Date]

[Organization Name]
[Organization Address]

To Whom It May Concern,

Re: Notification of Death - [Deceased's Full Name]
Account/Reference Number: [Number]

I am writing to notify you of the death of [Deceased's Full Name], who passed away on [Date of Death].

[Deceased's Name] held an account/membership/subscription with your organization. A certified copy of the death certificate is enclosed.

Please:

1. Close the account/cancel the membership/subscription
2. Advise if there are any outstanding payments or refunds owing
3. Update your records to prevent further correspondence

Please send any final statements or refunds to:

[Your Name]
[Your Address]

Sincerely,

[Your Signature]
[Your Printed Name]
Executor for the Estate of [Deceased's Full Name]

Enclosures: Certified copy of death certificate

TIPS FOR USING THESE TEMPLATES

- ☐ Always include a certified copy of the death certificate
- ☐ Keep a copy of every letter you send
- ☐ Record the date sent and follow up if no response within 2 weeks
- ☐ Use Certified Mail for important notifications
- ☐ Be clear about what you're requesting
- ☐ Include your contact details
- ☐ Be patient - some organizations take longer to respond than others

Your Notification Templates

A checklist of who to notify, and a place to track every notification you send.

WHO TO NOTIFY

Banks (all accounts)
Retirement plan administrators
Social Security (if applicable)
U.S. Department of Veterans Affairs (VA) (if applicable)
Employer
Life insurance companies
Health insurance
Home & contents insurance
Car insurance
County/city property tax office
Electricity, gas and water providers
Internet, phone and mobile providers
Subscriptions (streaming, etc.)
Gym / club memberships
Professional associations
Roadside assistance (AAA, etc.)
USPS (redirect mail)
County election office
Medicare
Internal Revenue Service (via accountant)

Your Notification Templates (cont.)

RECORD OF NOTIFICATIONS SENT

Log each notification and follow up if you don't hear back within 2 weeks.

ORGANIZATION	DATE SENT	RESPONSE RECEIVED?	FOLLOW-UP NEEDED?
--------------	-----------	--------------------	-------------------

Your Notification Templates (cont.)

ORGANIZATION	DATE SENT	RESPONSE RECEIVED?	FOLLOW-UP NEEDED?
--------------	-----------	--------------------	-------------------

NOTES