

# Getting Your Affairs in Order Checklist For Grey Eagles Members and Spouses

With a little pre-planning, this checklist may help your family with the details they need.  
**Immediately upon the death of a spouse, notify the following people:**

- American Airlines HR Services** (retiree benefits and privileges, i.e., medical, life, travel): **800-447-2000** or 817-967-1770
- Social Security Administration: 800-772-1213**  
Check with Social Security Office for possible death benefits and changes to survivor benefits. You may need to return their last check or have the bank do this if you use direct deposit.
- Medicare: 1-800-333-7586**  
Have all physicians and hospitals submit all Medicare forms for you. After you receive the Medicare statement, submit it along with copies of bills to supplemental insurance agency.

Auto, home and other insurance policies: If necessary, change the name on these.

**Your Attorney/Insurance Agents**

Name: \_\_\_\_\_ Phone No: \_\_\_\_\_

Name: \_\_\_\_\_ Phone No: \_\_\_\_\_

Name: \_\_\_\_\_ Phone No: \_\_\_\_\_

**Your Life Insurance Company** - Seek the help of your insurance agent

Name: \_\_\_\_\_ Location of Policy \_\_\_\_\_

Bank accounts and credit cards: Change ownership, beneficiaries and names if necessary.

**Your Banks** - Make a list of contents of any safe deposit boxes.

American Airlines Federal Credit Union: **800-533-0035** or 817-952-4500

Other: \_\_\_\_\_

Other: \_\_\_\_\_

**Your Credit Card Companies**

Card: \_\_\_\_\_

Card: \_\_\_\_\_

Card: \_\_\_\_\_

Card: \_\_\_\_\_

**Allied Pilots Association** (AA pilot union): **800-323-1470**

**The Grey Eagles** (retired AA pilots organization): **215-364-0473**

We care for each other and want you to know we care for you at this difficult time.

**Veterans Administration:** If you are the family of a veteran

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(Contd.)

**Funeral Services** (If pre-arranged):  
Funeral Home: \_\_\_\_\_ Phone No: \_\_\_\_\_

If making arrangements:

- What are your spouse's wishes**, e.g., burial, cremation, big funeral or quiet memorial?
- Ask funeral director for at least a **dozen certified copies of the death certificate**.
- To save stress, write yours or spouse's obituary now and attach to checklist.

## The Will or Trust:

Probate the Will: This process varies from state to state and can become very involved. If the Executor/Executrix is unable to appear, a designated alternate may appear instead. If an alternate is not specified, an interested party, with power of attorney may appear instead. If there is more than one beneficiary, all beneficiaries must appear so that the clerk can determine that the Will is not going to be contested. **Location of Will or Trust** \_\_\_\_\_

Determine who is the Executor or the Executrix of the Estate. They will have to sign all the papers pertaining to the Estate, and will have to appear at the Probate Court to probate the Will. **Executor/Executrix:** \_\_\_\_\_

## Monetary Matters:

The IRS: You must determine if any estate taxes are due by conducting an inventory of the Estate. Start this process with the safe deposit box by having a bank official certify the list of contents. This will establish that you have accounted for all monies.

A value must be established on your home and personal property at the time of death. If you sell your home, or any personal property, this establishes the value. If you retain it, you must establish value by an appraisal. Make sure to get an appraisal from several sources and don't forget all your personal property: the furniture, the autos, boats, airplanes, summer home! When all are added together, the value of the Estate may become quite large and be subject to tax. Obtain the services of a recommended tax accountant, or attorney, if you do not already have one. Establish the fee before contracting any services from him or her.

Establish a Special Checking Account for the Executor/Executrix for the Estate: Do this even if you are the Executor/Executrix and pay all the deceased's bills from this account. Check to see if any loans are covered by any special insurance policies that might pay these off. Check with your tax accountant to see if they should be paid or simply have the name changed on these loans. These are all deductible from the Estate and may help to lower your tax burden. The bills that will have to be paid from this account may include funeral expenses, mortuary, cemetery, minister, hospital bills. You may wish to pay off any outstanding debts using this account even though you may wish to refinance them later. This again helps to lower the value of the Estate.

**Other or Special Items:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_