

## **Name Changes: Whom to Inform Checklist**

### **GOVERNMENT**

- Social Security  
([www.socialsecurity.gov/forms/ss-5.pdf](http://www.socialsecurity.gov/forms/ss-5.pdf))
- Driver's License/State ID
- Car Registration
- Car Title
- Passport
- Professional License
- Voter Registration
- U.S. Postal Service
- IRS
- State Tax Department
- Birth Certificate

### **BANK RECORDS**

- Checking
- Savings
- CD
- Money Market
- Trust Accounts
- Bank Cards

### **CREDIT/CHARGE CARDS**

- Visa
- MasterCard
- American Express
- Capital One
- Discover

### **LOANS**

- Auto Loans
- Student Loans/Grants
- Mortgage
- Personal Loans
- Discover

### **EMPLOYMENT**

- Payroll
- Benefits Administrator
- Pension Administrator
- I.D. Card
- Unions
- Licenses
- Professional Website
- Business Cards

### **HOUSING**

- Landlord
- Homeowner's Association
- Tenants Association
- Management Company

### **INSURANCE**

- Auto Insurance
- Homeowner's/Renter's Insurance
- Medical Insurance
- Dental Insurance
- Unemployment/Disability
- Vision Insurance

### **DOCTORS/MEDICAL RECORDS**

- Primary Care
- Dental
- Vision
- Surgeon
- Therapist
- OB/GYN
- Pharmacist

## **INVESTMENTS**

- IRA
- 401K
- Pension (Beneficiaries)
- Brokerage
- Trusts

## **BUSINESSS**

- Health Club
- Supermarket Club Card
- Web Businesses (Groupon, eBay, Etc.)
- iTunes
- Amazon
- Frequently Used Websites
- Frequent Flyer Programs

## **UTILITIES**

- Cell Phone
- Internet Provider
- Landline
- TV
- Electricity
- Water
- Gas

## **SUBSCRIPTIONS**

- Magazine
- Newspaper

## **SCHOOL (OTHER THAN LOANS)**

- Student Records (HS)
- Transcripts (HS)
- Student Records (College)
- Transcripts (College)

## **OTHER PEOPLE/PARENTS**

- Wills
- Trust
- Insurance

## **MISCELLANEOUS**

- Email (Work, School, Personal)
- Facebook
- Social Media
- Library Card

## **PROFESSIONALS**

- Accountant
- Attorney
- Investment Advisor
- Vet/Pet Caretakers

## **LEGAL**

- Health Proxy
- Will