

# ACCOUNTS TO CANCEL

## When A Loved One Dies

### FINANCIAL ACCOUNTS

- Bank #1 \_\_\_\_\_
- Bank #2 \_\_\_\_\_
- Bank #3 \_\_\_\_\_
- Credit union \_\_\_\_\_
- Credit card #1 \_\_\_\_\_
- Credit card #2 \_\_\_\_\_
- Credit card #3 \_\_\_\_\_
- Credit card #4 \_\_\_\_\_
- Credit card #5 \_\_\_\_\_
- Mortgage company \_\_\_\_\_
- Landlord \_\_\_\_\_
- Auto loan #1 \_\_\_\_\_
- Auto loan #2 \_\_\_\_\_
- Retirement accounts \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
  
- Certificate of Deposit \_\_\_\_\_
- PayPal \_\_\_\_\_
- BitCoin \_\_\_\_\_
- Other \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## INSURANCE

- Auto insurance \_\_\_\_\_
- Homeowners/renters \_\_\_\_\_
- Mortgage insurance \_\_\_\_\_
- Health insurance \_\_\_\_\_
- Life insurance \_\_\_\_\_
- Vision/dental insurance \_\_\_\_\_
- Other \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

## UTILITIES

- Cell phone \_\_\_\_\_
- Landline telephone \_\_\_\_\_
- Cable television \_\_\_\_\_
- Internet \_\_\_\_\_
- Garbage & recycling \_\_\_\_\_
- Electric \_\_\_\_\_
- Gas \_\_\_\_\_
- Water \_\_\_\_\_
- Sewer \_\_\_\_\_
- Other \_\_\_\_\_
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- \_\_\_\_\_
- \_\_\_\_\_

## SUBSCRIPTIONS

Newspapers

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Magazines

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Online news/mags

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Home security system

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Netflix/Hulu/HBO/etc

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Amazon Prime

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Spotify/iTunes/Pandora

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Online gaming

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Online photo/data

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Antivirus/Norton/AVG

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Monthly box

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Other subscriptions

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*Some common subscriptions: Adobe, Microsoft Office, Quickbooks, Dropbox, Evernote, Steam, Xbox Live, Birchbox, Showtime, Starz, Sling TV, MLB.tv, streaming sports, niche website subscriptions, paid app subscriptions, monthly clothing/shoes/shaving/food deliveries.*

## MEMEBERSHIPS

- Trade unions \_\_\_\_\_
- Gym/health club \_\_\_\_\_
- Homeowners association \_\_\_\_\_
- Costco \_\_\_\_\_
- Vitamins/supplements \_\_\_\_\_
- Prescription clubs \_\_\_\_\_
- Health cost-sharing \_\_\_\_\_
- Dental savings clubs \_\_\_\_\_
- Other \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## BUSINESS OWNERS

- Business bank acct \_\_\_\_\_
- Business credit cards \_\_\_\_\_
- Business phone \_\_\_\_\_
- Business utilities \_\_\_\_\_
- Business insurance \_\_\_\_\_
- Business car insurance \_\_\_\_\_
- Business memberships \_\_\_\_\_
- Website dues \_\_\_\_\_
- Other \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

*Common recurring business costs: Website hosting, domain name, SSL, content management systems; business associations such as local city, county, or state business associations, Better Business Bureau, industry affiliations, certifications; advertising including online (Google Adwords), print, billboards, etc; recurring supplies and deliveries.*

## OTHER ACCOUNTS AND DUES

- Social Security \_\_\_\_\_
  - Child support \_\_\_\_\_
  - Pet-related dues \_\_\_\_\_
  - Financial advisor \_\_\_\_\_
  - Accountant \_\_\_\_\_
  - Personal trainer \_\_\_\_\_
  - College classes \_\_\_\_\_
  - Hobby clubs \_\_\_\_\_
  - Other \_\_\_\_\_
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*Many of these lifestyle memberships or subscriptions are paid yearly, or monthly on draws from a checking account. Make sure that the memberships are canceled so that there are no further charges. And it doesn't hurt to ask for a partial refund for yearly dues paid in full.*