

Blank contact log

Leave full Social Security numbers, passwords and complete account numbers off this worksheet. Use a short account reference if you need to distinguish contacts.

Use the company's instructions for the actual submission. This script is a way to prepare a contact.

One office or company contact

Office or company

Official contact route

Helper handling this contact

Contact date

Person spoken to or reference number

Blank contact log (continued)

Documents requested

How and when documents were submitted

Receipt or acknowledgement received

Next task

Follow-up date

Status

Status choices: Not contacted / Report sent / Waiting for documents / Waiting for response / Receipt confirmed / Further action needed

A reference number records the contact; another requested task may still remain.

Agencies to notify when someone dies. USAGov. Updated August 31, 2026.

<https://www.usa.gov/report-a-death>

Chase Estate Services FAQs. JPMorgan Chase Bank, N.A.. Undated; accessed October 13, 2026.

<https://www.chase.com/content/chase-ux/en/personal/estate-services/faqs>

Use a short call script

Use the company's instructions for the actual submission. This script is a way to prepare a contact.

Leave full Social Security numbers, passwords and complete account numbers off this worksheet.

Use a short account reference if you need to distinguish contacts.

I would like to report that [name] died on [date]. My name is [your name], and I am their [relationship or role]. What process do you use for a death report? What information or documents do you need, and where should I send them? Who may complete the next request? Please give me a reference number and explain what happens next.

Has the report or paperwork been received?

Is any document missing? Does it need to be a copy or a certified copy?

Which contact route should I use to submit it?

Does reporting the death change any service or access that the household still uses?

What should I expect next, and when should I check back?

A reference number records the contact; another requested task may still remain.

Chase Estate Services FAQs. JPMorgan Chase Bank, N.A.. Undated; accessed October 13, 2026.

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Filled example, using fictional details

Fictional example. The details below illustrate how to use the log and describe no actual account, report or authority.

Example Bank contact

Office or company: Example Bank

Helper handling this contact: Alex Example

Contact date: October 13, 2026

Person spoken to or reference number: Example reference 123

Documents requested: The bank's requested document list

Receipt or acknowledgement received: Report received; documents still needed

Next task: Ask the bank which delivery route to use

Follow-up date: The date agreed with the bank

Status: Waiting for documents

A reference number records the contact; another requested task may still remain.