

Checklist for Family Survivors



We understand at the time of a loved ones passing it can be a difficult and confusing time. This checklist is created in an effort to provide support and direction if that unfortunate situation occurs. Please read and keep this in your files. Please notify the City of Sarasota Departments below within 7 days of a retiree's passing.

Per the Plan Rules, all medical, dental, vision and legal benefits for the primary member will end at midnight on the day the retiree passes away. The surviving spouse will not be terminated from insurance until contact is made with Human Resources. The surviving spouse has the ability to determine their own insurance needs. If the surviving spouse does not contact Human Resources within 7 days, the surviving spouse will remain on the insurance and charged the surviving spouse rate and no reimbursement can be made after payment has been deducted from their pension.

- Contact **City of Sarasota Human Resources Department**: 941-263-6476
Address: 111 S. Orange Ave, Ste 204, Sarasota, FL 34236
 - City's Medical Coverage or Other Insurance Plans: If the *surviving spouse* is on the City's insurance plan and wishes to remain on the insurance plan, please notify the Human Resources Representative at the time of your call. The premiums would be the surviving spouse monthly rate. This monthly premium would be an unsubsidized rate without any City contribution.
 - Life Insurance: When contacting Human Resources, they will assist in determining if the retiree had a City life insurance policy. A copy of the death certificate-long form would need to be provided to Human Resources. The retiree may have additional life insurance benefits outside of the City and will need to be pursued by the beneficiary.

- Contact **City of Sarasota Pension Department**: 941-954-4141
Address: 1565 1st Street, Room 110, Sarasota, FL 34236
 - Copy of death certificate needed
 - Schedule an appointment with the Pension Representative to determine if the survivor is eligible for survivor pension benefits.

Contact the **First Street Credit Union**: 941-953-6744

Address: 1558 1st Street, Sarasota, FL 34236

- When contacting the Credit Union, they will assist in determining if the retiree had an account or a life insurance benefit. A copy of the death certificate will be needed before the Credit Union representative will discuss life insurance or make any changes to the member's account, even if it is a joint account.

There may be additional items that may need your attention (outside the purview of the City) such as:

- Social Security Office
- Banking Institutions
- Doctors/Providers
- Life Insurance Policies
- Vehicle/DMV

Disclaimer: This information is not an all-inclusive list, rather a suggestion of items to take care of.

Legal Disclaimer: This checklist is only intended to be a general summary only and is not a substitute for legal/tax advice. Before taking any actions based on information listed, we encourage you to consult with the appropriate legal professionals.