

Unsure of what to do next?

No checklist can cover all the thoughts going through your head, but here's a place to start:

- ✔ Order copies of the death certificate.
- ✔ Gather financial information.
 - › Bank accounts
 - › Credit cards
 - › Retirement plans
- ✔ Locate any safety deposit boxes.
- ✔ Locate official documents, like wills, income tax returns, or trusts.
- ✔ Contact an attorney.
- ✔ Contact the Social Security Administration.
- ✔ Review your financial situation.
- ✔ Review your designated beneficiary.
- ✔ Update or create your will.

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Magellan Healthcare

Magellan Healthcare's employer solutions are built upon 50 years of behavioral health expertise, with services designed to improve organizational effectiveness and employee well-being at every stage of life. Magellan's Employee Assistance Program (EAP) enhances emotional wellness, reduces stress, and increases productivity. Magellan offers easily accessible emotional, physical, and life enrichment services to support employees and their household members with life's ups and downs.

ARAG Services, LLC

ARAG (ARAGlegal.com) is the world's leading legal insurer, connecting people with affordable and professional legal counsel and services for everyday life needs. The company has an international premium base of more than \$2 billion and protects \$23.3 million individuals and their families worldwide, as of April 2023.

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Group life insurance

Navigating the loss of a spouse

Beneficiary Support Services provide help during difficult times.



The loss of a loved one might be one of the hardest things you ever go through. And while the details and decisions you face may seem overwhelming, you don't have to go it alone.

A guide through grief

We know that during difficult times, it's easy to put yourself last. That's why Principal® provides beneficiaries of our life insurance policies with Grief Support Services from Magellan Healthcare that can help you focus on your well-being.

When you need support, get in touch.

Consultation: **800-274-4529**

International: **800-662-4504**

TTY for hearing impaired: **711**

Online resources:

Member.MagellanHealthcare.com

Enter **Principal Grief Support** for the program name.

¹ Not available to group policies issued in New York.

² Online only.

³ **Investing involves risk, including possible loss of principal.**

Grief Support Services for you and your family include:

- 24/7 phone consultation with licensed EAP professional
- Legal, financial, and identity theft services
- Referrals to community resources for more help
- Organizational support
- Private self-screening
- Three free in-person or virtual counseling sessions¹

You also have access to online resources, such as:

- Health and wellness resources
- Legal tools and forms²
- Wellness programs to help reduce stress, manage depression, control anxiety, and much more
- Resources for talking to children about death
- Parenting and eldercare support

Need additional assistance?

A counselor can help you find an affordable solution. Any fees resulting from referrals outside of Grief Support Services are your responsibility.

Investing in yourself

Your loved one made an investment in your future. We can help you protect and manage it. Whether you have questions about investments³, income, or insurance options, we'll be there to help you.

Ready to talk to a financial professional?

Call 877-692-3831 between 7 a.m. and 7 p.m. Central time.

Taking a look at your legal documents

After the loss of a loved one, it may be a good idea to review or prepare your own legal documents. For three months following the loss, you'll have access to the Will & Legal Document Center from ARAG® to help guide you through the following:

Will. Outlines what happens to your property and assets after your passing and who will carry out your wishes.

Living will. Tells health care providers and family members about your medical treatment wishes if you're unable to speak for yourself.

Health care power of attorney. Appoints someone to make medical decisions on your behalf when you can't make them yourself.

Durable power of attorney. Appoints someone to make your financial decisions if you can't make them yourself.

HIPAA authorization. Grants someone access to obtain your medical records and permission to view and use your protected health information.

Ready to create your documents?

Visit [aragwills.com/principal](https://www.aragwills.com/principal)

For registration or technical assistance, contact ARAG at 800-546-3718. Questions about this service? Call Principal at 866-539-1728.