

Document Checklist

Check List	Documents	Purpose of Document	Likely Location
<input type="checkbox"/>	Original life insurance policies or annuity contracts (or policy numbers or contract numbers) on the deceased	Needed to file claims and inquire about methods of payments	Safe deposit box, home or office desk, safe, file cabinet
<input type="checkbox"/>	Certified death certificates	Required to process claims Required to apply for Social Security benefits, including Railroad Retirement Act benefits, burial allowance, lump sum benefit Required to apply for VA benefits, including burial allowance (photocopy OK) Bring to your attorney (photocopy OK) Required to change ownership on joint property, such as house, property, stocks, bonds, automobile, bank accounts Required to enter safe deposit box Required to file tax return	Request certified copies from Funeral Director or County Clerk's office
<input type="checkbox"/>	Dated obituary notice and newspaper articles	May be required for processing claims	Clip from local newspaper
<input type="checkbox"/>	Certificates of appointments (if you are filing as executor, administrator, or in any other fiduciary responsibility)	May be required for processing of claims and disposing of assets	Obtain certified copy of the appointment from the court
<input type="checkbox"/>	Will	Bring to an attorney or to the Surrogate Court	Safe deposit box, home or office desk, safe, file cabinet, the attorney who drew up the will, or on file at the Surrogate Court
<input type="checkbox"/>	Marriage certificate(s)	Required to apply for Social Security benefits Required to apply for VA benefits (photocopy OK) Bring to your attorney (photocopy OK)	Safe deposit box, home or office desk, safe, file cabinet
<input type="checkbox"/>	Domestic partner or civil union certificates	Required to claim any state or employer-sponsored benefits	Safe deposit box, home or office desk, safe, file cabinet, on file with the municipality that issued the certificate
<input type="checkbox"/>	Names and addresses of heirs, next of kin, beneficiaries	Bring to your attorney Bring to the Surrogate Court if you are not using an attorney	Safe deposit box, home or office desk, safe, or best of your knowledge
<input type="checkbox"/>	Summary of deceased's assets	Bring to your attorney	Safe deposit box, home or office desk; these papers might include the W-2 form, recent tax returns, property and casualty insurance form records
<input type="checkbox"/>	Business records such as Partnership Agreements, Buy-Sell Agreements, Tax Records, Balance Sheet	Bring to your attorney	Your accountant, safe deposit box, home or office desk, safe, file cabinet

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<input type="checkbox"/>	Employee benefits statement for deceased	Help determine the benefits you are entitled to as the survivor	Safe deposit box, home or office desk, safe, file cabinet, or contact employer
<input type="checkbox"/>	Your retirement plans and employee benefits	Change beneficiary designation	Safe deposit box, home or office desk, safe, file cabinet
<input type="checkbox"/>	Social Security numbers or cards	Required to apply for Social Security benefits	Wallet, W-2 form, paycheck stub, file cabinet, or contact employer
<input type="checkbox"/>	Deceased's approximate earnings during the year of death	Required to apply for Social Security benefits	Paycheck stub, or contact the employer
<input type="checkbox"/>	Government life insurance policy number (or the "C" claim number, military service serial number, the branch and date of military service, or a copy of the discharge papers)	Required to apply for VA benefits	Safe deposit box, home or office desk, safe, file cabinet; the VA can help you secure some of these documents
<input type="checkbox"/>	Membership cards or dues notices to organizations and associations to which the deceased belonged	Ask what benefits you are entitled to as the survivor	Home or office desk, briefcase, wallet
<input type="checkbox"/>	Bank statements and passbooks, keys to safe deposit box	Ask the bank if the deceased had mortgage insurance, safe deposit box, trust agreements, bank accounts	Safe deposit box, home or office desk, safe, file cabinet
<input type="checkbox"/>	Fire, homeowners, automobile and other casualty insurance coverage	Change name on policies	Safe deposit box, home or office desk, safe, file cabinet
<input type="checkbox"/>	Medical and disability insurance policies and certificates	Needed to review amount and type of coverage you need now	Safe deposit box, home or office desk, safe, file cabinet
<input type="checkbox"/>	Current bills	Discuss with an attorney or Surrogate Court Prepare household budget	Monitor mail for two months
<input type="checkbox"/>	Installment payment books, credit cards, checking account book, credit agreements, loan papers	Find out if there is credit life insurance or disability insurance on installment loans, credit cards and checking account lines of credit Change name on existing accounts	File cabinet, home or office desk; also monitor mail for two months
<input type="checkbox"/>	Joint billing statements (utilities, etc.)	Change name on these accounts	Home or office desk, file cabinet
<input type="checkbox"/>	Real estate deeds	Required to change name on these deeds	Safe deposit box, home or office desk, safe, file cabinet
<input type="checkbox"/>	Brokerage and mutual fund statements, stocks, bonds and securities certificates	Change name on deceased's account and joint account	Safe deposit box, home or office desk, safe, file cabinet
<input type="checkbox"/>	Automobile registration	Required to change name	Home or office desk, or glove compartment
<input type="checkbox"/>	Life insurance policies or annuity contract on you and other family members	Change beneficiary if the deceased is named For life insurance, ask if children's coverage is automatically paid up	Safe deposit box, home or office desk, safe, file cabinet