

- Death certificates.** You'll need many copies of this; it's likely every service and organization with which the Deceased had a relationship will want one as proof of death to close accounts.
- Marriage certificate.** If you are a widow or widower, some organizations will request a copy of your marriage certificate as well as the death certificate to prove your relationship to the Deceased.
- Birth certificate.** Birth certificates of dependent children might be helpful when signing up for benefits.
- Papers designating you as personal representative or executor.** In order for you to take over accounts, you'll need to have authentic documentation to prove you are legally acting on behalf of the Deceased.
- The will.** You'll need several copies of this as well as the original, especially if going through probate or small estates proceedings.
- Social Security card/number.** You likely won't actually need to submit the Deceased's card, but you will need to have their social security number handy. You'll also need the social security numbers of any dependent children.
- Tally of the assets, deeds and titles to property.** You may need to submit these in court if going through probate or other proceedings, and in other situations as well.
- Income Tax Returns, loan records, bank books.** You'll need these both for probate and for filing the last income tax return. They may be useful in other matters as well. The most recent year's tax return is the most important, but several years back may also be helpful.
- Discharge papers.** If the Deceased was a veteran of the armed forces, the discharge certificate will be necessary when registering for benefits.
- Insurance policies, property deeds, vehicle titles, stock and bond certificates.** Have a copy of all documents handy.

The contents of this checklist are intended to provide helpful suggestions to a family member or other survivor who has assumed the duties of concluding the affairs of a loved one/decendent. The list is not intended to be exhaustive. It is not intended to provide legal or financial advice nor to be relied on in lieu of such services. If you have specific questions relating to an estate you are handling, you may find it helpful to consult with a probate attorney or financial professional.