

# SUGGESTED CHECKLIST



To Do:	Month:	Date:	Complete:
1. Collect Important Papers	1		
• Death Certificates	1		
• Insurance Policies	1		
• Marriage License	1		
• Birth Certificates	1		
• Estate Planning Documents (ex. Trust, Will, etc.)	1		
• Veteran's discharge papers	1		
• Social Security Cards/Numbers	1		
• Most Recent Tax Return	1		
2. Forward Decedent's Mail	1		
3. Apply for Benefits	1		
• Life Insurance Proceeds	1		
• Retirement Plan Benefits	1		
• Veterans' Benefits	1		
• Other Employee Benefits	1		
• Social Security Benefits	1		
4. Contact an Attorney and a Tax Preparer	1-3		
5. File for Probate	1-3		
6. Change Titles and Ownership	1-3		
• Home	1-3		
• Insurance Policies	1-3		
• Vehicles	1-3		
• Update Estate Documents	1-3		
• Credit Cards	1-3		
• Bank Accounts	1-3		
• Stocks, Bonds, and Other Investments	1-3		
• Safe Deposit Boxes	1-3		
• Update POD/TOD	1-3		
7. Complete Notifications of Death	1-3		
8. Hire a Financial Advisor	3-6		
9. Review Finances	3-6		
10. File and Pay Taxes	3-12		

*This is not a comprehensive list, rather a suggested checklist and timeline of things you may need to handle. This list may differ based on your own situation, please seek outside counsel as you make these decisions.*