

KEY CONTACTS & DOCUMENT CHECKLIST

Key Contacts

Name

Phone

Email

Attorney _____

Financial Professional _____

Insurance Representative _____

Bank Representative _____

Funeral Service Provider _____

His Employer/HR Contact Person _____

Local Social Security Office _____

Documents

FIND IMMEDIATELY AFTER HIS PASSING

- His Social Security card
- His birth certificate
- His driver's license (check for organ donation)
- Military discharge papers (Veterans receive a small stipend toward burial expenses)
- Burial instructions
- Cemetery plot deed
- Pre-paid cremation documents
- Funeral home preference and information
- Charitable donation preference(s) for obituary
- Letter of instruction from your husband (if available)
- Original Last Will and Testament

HAVE READILY AVAILABLE THE FIRST 60 DAYS

- Death Certificate
- Social Security card numbers (all family members)
- Birth certificates (all family members)
- Passport/Citizenship (naturalization papers)
- Copy of his and your driver's licenses
- Marriage certificate
- Adoption papers
- Copy of the will
- Copy of any trust documents

NECESSARY WITHIN THE FIRST SIX MONTHS TO ONE YEAR

- Life insurance policy documents
- Health insurance policy documents (to continue your benefits)
- Business buy/sell or partnership agreement documents
- Will and trust documents
- Deferred compensation agreements
- Prior year's tax returns
- Federal/State/Gift tax returns
- Motor vehicle title papers
- Lawsuit or documents on pending legal actions
- Promissory notes (debts owed)
- Loans outstanding (money owed)
- Mortgage documents
- Real estate deeds, other titles of ownership
- Property tax records
- Rental and/or lease agreements
- Bank Account and Credit Card documents
- Investment Account documents
- Insurance and Annuity documents
- Property and Casualty Insurance Policy documents

