

**POST MORTEM CHECKLIST
(Information/Documentation)**

Decedent's name: _____ SSN: _____
 Spouse's name: _____ SSN: _____
 DOB: _____ DOD: _____

At time of death: _____ will _____ no will _____ living trust

Trustee/Executor/Administrator: _____

Address: _____

Phone No.: _____ Email address: _____

Employer/contact: _____ / _____ Phone no.: _____

Attorney: _____ Phone no.: _____

Accountant: _____ Phone no.: _____

Broker/Financial Planner: _____ Phone no.: _____

Life Insurance Agent: _____ Phone no.: _____

Approximate size of estate: \$ _____

Documents needed (*=supply documents for month of decedent's death):

- _____ Copy of will or living trust
- _____ Death certificate
- _____ Copy of any pre or post-nuptial spousal property agreements
- _____ Income
- _____ Tax return (most recent 3 years)
- _____ Gift tax returns (any that have been filed)
- _____ Current brokerage account statements*
- _____ Copies of property tax bills for real estate owned
- _____ Copies of deeds to real property
- _____ Copies of checking services and CD statements*
- _____ Copies of stock and bond certificates if not held by broker
- _____ Copies of life insurance policies or settlement checks if benefits have been paid. Obtain Form 712 from insurance companies
- _____ Name and address for limited or general partnership investments
- _____ Copies of promissory notes
- _____ Copies of any IRA 401(k), pension or annuity statements*
- _____ Copies of appraisals of real estate, other assets or business owned.
- _____ Copies of all vehicle registrations (car, boat, motor home, air plane)
- _____ Copies of any leases
- _____ List of decedent's debts or debts the decedent was a guarantor or co-signor (include name and address of creditor)
- _____ List of funeral expenses
- _____ List of heirs or beneficiaries that includes name, age, social security no., address, phone no. and relationship to decedent
- _____ List of any collectibles (i.e. artwork, coins, jewelry) owned by decedent
- _____ List of safe deposit box contents
- _____ Documentation for any other assets owned (i.e. royalty agreements, copyrights, trademarks, patents, franchises)