

Why We Need Death Certificates

Life Insurance – you need 1 for each insurance company

Banks – you need 1 for each account that the deceased name is on

Stocks – if held by the individual or jointly owned, you need 1 for each company.
If held by the broker, then you need 1 for each broker

Bonds – you need 1 for US Savings Bonds, Bonds can be reissued to new owners. If you have corporate bonds, you will need 1 for each company

Real Estate – you will need 1 for each county in which property is owned

Secretary of State – you need 1. This may be used for automobile, boat and or mobile home.

IRAs – you need 1 for each financial institution where funds are maintained.

CD's – you need 1 for each financial institution where funds are maintained.

Pension – you need 1 for each pension fund.

Health Insurance –you may need 1 if insurance is employer provided.

Current Pay – you may need 1 if still actively employed.

401K/403b/Retirement Plans – you need 1 for each depository.

Federal Income Tax – you need 1.

State Income Tax – you need 1.

Probate – if there is to be Probate of the Estate, you need at least 5.

Social Security Administration – needs to see original but will give back after making copy