Survivor's Checklist

IMMEDIATE ACTION TO BE TAKEN:

1. Make necessary funeral arrangements.

   * Location / Phone # of Burial Plot:

   ____

   * Burial instructions (Bury vs. Cremate...)

   ____

2. Notify relatives and friends.

3. Collect copies of:
   Most Recent Notarized Will,
   Certified copies of the Death Certificate (at least 12 from funeral director),
   Insurance policies,
   Latest Bank and Investment Statements,
   Birth Certificates,
   Marriage License,
   Social Security Numbers ____,
   Veterans Administration Numbers ____,
   List of Employer Fringe Benefits,
   Last three tax returns.

4. Contact Estate Attorney _______________________________________ Phone: ___________________,
   to notify witnesses to the reading of the Will and to handle the Estate settlement.

5. Advise Executor of the estate, if known. Executor_________________________Phone#________________

6. Contact Bank to verify status of checking, savings, and safety deposit box.

   Bank Name / Phone# ____

   Bank Name / Phone# ____

7. Notify Casualty Insurance broker to modify casualty and homeowners insurance as necessary.

8. Locate investment securities and contact broker to arrange retitling, if necessary.

Company____________________ Account#_________________ Agent_________ Phone#________

Company____________________ Account#_________________ Agent_________ Phone#________

Company____________________ Account#_________________ Agent_________ Phone#________

Company____________________ Account#_________________ Agent_________ Phone#________

9. Have the Executor adjust ownership of any insurance policies on the lives of others owned by the deceased.

10. Have Executor retitle real estate that was owned by the deceased.

LIFE & ACCIDENTAL DEATH INSURANCE POLICIES:

1. Contact Insurance companies or agent and obtain a death claim form.

Insured_____________ Company_________________ Policy#__________ Phone#_______________

Insured_____________ Company_________________ Policy#__________ Phone#_______________

Insured_____________ Company_________________ Policy#__________ Phone#_______________

Insured_____________ Company_________________ Policy#__________ Phone#_______________

2. Complete form and send it along with a certified copy of death certificate.

SOCIAL SECURITY:

1. Apply to nearest Social Security office in person and bring:
   * Social Security Number of deceased
   * Certified copy of the Death Certificate
   * Proof of Relationship (Marriage license, Birth Certificate)

2. Follow up on benefits if not received within 60 days

VETERAN'S BENEFITS:

1. Inquire in person to the local office as to eligibility

2. Deliver required documentation
   * Birth Certificate
   * Social Security Number
   * Certified Death Certificate
   * V.A. Records

COMPANY BENEFITS:

1. Contact the employer of the deceased's employee benefits department immediately
   and request a listing of death benefits payable to you, and how they are paid.
   Benefits Department Phone: ___________________________

2. Provide employer with required Certified Death Certificates and other documentation needed.

SAFE DEPOSIT BOX:

1. Arrange with Executor to take an inventory of the contents
   Bank ____ Box#_________
   Location of Key____

2. Determine what, if any, contents that may be removed with a receipt

FILING OF TAX RETURNS:

1. Determine who will prepare tax returns
   Preparer______________________________________ Phone#_________________
   * U.S. Estate Tax Return (Form 706)
   * Residence State Inheritance Tax Report
   * Inheritance or State Tax Returns for other states where property is held
   * Fiduciary Income Tax Return
   * Individual Income Tax Return
   * Estate Accounting

2. While the Probate attorney should review the above returns, your Tax attorney, CPA, or a Bank Trust department may prepare them. Our recommendation is that they are prepared by one firm or individual and that you have a clear understanding of the fees before the work is done.

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