

## Post Mortem Checklist

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)