

# Checklist for After Death Documents

## ADDITIONAL TIPS

- Keep all documents in one organized folder or binder
- Make copies and share with key individuals (executor, attorney, etc.)
- Track who you've contacted and what has been completed
- Expect this process to take weeks to months
- Focus on one step at a time, and ask for help when needed.

## DIGITAL INFORMATION

- Collect passwords to online accounts, including email and social media
- Review all subscription services

## MAIL FORWARDING

- Forward mail to a responsible person to ensure bills and other important mail is received

## CONNECT WITH US:

 800-543-8312

 [caregiveroc.org](http://caregiveroc.org)

**After a loved one passes,** gathering the right documents helps you to carry out their wishes, access accounts and benefits and settle legal and financial matters. Having these documents ready can reduce delays, stress, and confusion during an already difficult time.

1

### Priority Documents to Obtain

- Certified Death Certificates (10 - 20 copies)
- Medical Death Pronouncement
- Locate any funeral or burial plans

2

### Essential Legal Documents

- Executor Information
- Will (Last Will and Testament)
- Trust Documents (if applicable)
- Advanced Directives
- Birth Certificate
- Social Security Number/Card
- Marriage and/or Divorce Records

*These help establish identity and legal decision-making.*

3

### Financial & Account Documents

- Bank Account Information
- Investment/Retirement Accounts
- Life Insurance Policies
- Pension Documents
- Recent Tax Returns
- Credit Card Statements
- Bills and Loans

*These help identify ongoing financial obligations.*

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### Ownership Records

- Real Estate Deeds
- Mortgage Documents
- Vehicle Titles

*These are needed to transfer or close ownership of assets.*