

CHECK LIST TO ASSIST IN SETTLING AN ESTATE

DONE NOT
 APPLICABLE

1. Collect important papers

Death certificate	_____	<input type="checkbox"/>	<input type="checkbox"/>
Insurance policies	_____	<input type="checkbox"/>	<input type="checkbox"/>
Marriage license	_____	<input type="checkbox"/>	<input type="checkbox"/>
Birth certificates	_____	<input type="checkbox"/>	<input type="checkbox"/>
The will	_____	<input type="checkbox"/>	<input type="checkbox"/>
Veterans' discharge papers	_____	<input type="checkbox"/>	<input type="checkbox"/>
Social Security numbers	_____	<input type="checkbox"/>	<input type="checkbox"/>
Most recent tax returns	_____	<input type="checkbox"/>	<input type="checkbox"/>
Trust	_____	<input type="checkbox"/>	<input type="checkbox"/>
Divorce/Property Settlement	_____	<input type="checkbox"/>	<input type="checkbox"/>

2. Contact an attorney

3. File for probate of will

4. Apply for benefits

Life insurance proceeds	_____	<input type="checkbox"/>	<input type="checkbox"/>
Retirement plan benefits	_____	<input type="checkbox"/>	<input type="checkbox"/>
Veterans' benefits	_____	<input type="checkbox"/>	<input type="checkbox"/>
Other employee benefits	_____	<input type="checkbox"/>	<input type="checkbox"/>
Social Security benefits	_____	<input type="checkbox"/>	<input type="checkbox"/>

5. Change titles and ownership

Home	_____	<input type="checkbox"/>	<input type="checkbox"/>
Insurance policies	_____	<input type="checkbox"/>	<input type="checkbox"/>
Automobiles	_____	<input type="checkbox"/>	<input type="checkbox"/>
Your will	_____	<input type="checkbox"/>	<input type="checkbox"/>
Credit cards	_____	<input type="checkbox"/>	<input type="checkbox"/>
Bank accounts	_____	<input type="checkbox"/>	<input type="checkbox"/>
Stocks, bonds, other investments	_____	<input type="checkbox"/>	<input type="checkbox"/>
Safe deposit boxes	_____	<input type="checkbox"/>	<input type="checkbox"/>

6. Complete notifications of death

7. Hire an accountant

8. Review finances

9. File and pay applicable taxes