

You should locate the following documents and information:

Estate Planning documents:

1. Will signed by decedent. The will should be read immediately since it may tell you whether the decedent wanted to make organ and tissue donations and may express preferences for funeral arrangements. It should also name an executor.
2. Trusts established by decedent.

Life insurance policies owned by decedent. Do not throw away life insurance policies, even though you know the premiums have not been paid. The policies should be read to determine whether coverage has continued despite nonpayment of premiums, whether coverage can be reinstated, and whether any benefits still may be payable.

Retirement plans (including not only plans provided by current and former employers but also IRAs and self-employed retirement plans).

Business agreements involving decedent and business books and records.

Uniform Donor Card authorizing anatomical gifts.

Final instructions left by decedent. A list of final instructions can tell where documents and records are located, what property the decedent owned, what funeral arrangements the decedent wanted, and other information that may be needed.

Birth certificate for decedent.

Military discharge papers of decedent.

Marriage license.

Prenuptial agreement.

Divorce papers.

Birth certificates and adoption papers for decedent's children.

Deeds to property owned or coowned by decedent.

Vehicle registrations for decedent's vehicles.

Bank books, certificates of deposit and other evidence of ownership of accounts.

Stock certificates and other evidence of ownership of stocks and bonds.

Recent tax returns and W-2 forms.

Loan documents including mortgage.

Other insurance policies, including health, property and travel/accident insurance.

Membership benefit statements for all clubs, including auto club, and organizations to which decedent belonged.

Credit card benefit information.

Citizenship papers.

Appraisals of property.

Social Security card.

Death certificate. You will have to obtain certified copies of the death certificate. Photocopies of the death certificate may or may not be accepted. Certified copies of the death certificate usually are needed to collect life insurance proceeds and other death benefits, such as Social Security benefits, and to transfer title to property. Your funeral director can help you obtain certified copies, or you can order certified copies from your

local county clerk or state health department. Separate certified copies of the death certificate may be needed for each life insurance policy, each property transfer, and each death benefit.

Check safe-deposit box for wills, codicils, trust agreements, and funeral instructions. You will need to provide proof of death and proof of your identity. You should be allowed access to search for and obtain copies of these documents.