Loss of a Loved One

Financial Documents Checklist

When a loved one passes away, it can be hard to effectively manage finances. A simple checklist can make the process more manageable. It can guide your collection of important documents so you can gain a clear understanding of your current financial situation.

Whether you visit us in a branch or reach out online, we kindly ask for a copy of your loved one's death certificate to assist you. Please bring any documents you have, and we'll guide you through the process with care and support.

Document	**Company Name** (if applicable)	**Contact Person** (if applicable)	**Phone Number** (if applicable)	**Document Requested** (Yes/No)	**Document Received** (Yes/No)
Key Personal Documents					
Death Certificate					
Marriage Certificate					
Will/Estate Plan					
Social Security Card (of the deceased)					
Credit Reports (of the deceased)					
Debts					
Credit Card Statements					
Loan Documents					
Bank Account Statements					

Document	Company Name (if applicable)	Contact Person (if applicable)	Phone Number (if applicable)	Document Requested (Yes/No)	Document Received (Yes/No)

Financial Assets					
Retirement Account Statements (e.g., 401(k), IRAs, etc.)					
Investment Account Statements					
Auto Insurance Policy					
Home Insurance Policy					
Accidental Death and/or Life Insurance Policy					

Physical Assets					
Property Deeds					
Vehicle Titles					

Miscellaneous					
Paid Membership Organizations					
Benefit Statements (e.g., pension, Social Security Administration, etc.)					

NOTE: This checklist is for informational purposes only and is not intended to represent all of the financial documents you may need to handle your loved one's estate. Please consult with a qualified attorney counsel or tax advisor for assistance with additional documents you may need to collect based on your specific situation.