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IMPORTANT END-OF-LIFE **DOCUMENTS CHECKLIST**

This document checklist provides the locations of ____'s important end-of-life documents.

Document	Purpose	Document location
☐ Original life insurance/annuity policy	Filing claims and finding out payment information	
☐ Certified death certificates	Processing claims, entering safe deposit box, filing tax returns, Social Security and/or veteran benefits	Copies may be obtained from the funeral director or county clerk's office
☐ Will, summary of assets (if no will exists)	Providing to attorney and/or surrogate court	
☐ Marriage certificate(s)/domestic partnership agreement	Filing to receive benefits from Social Security, VA and/or state/employer	
☐ Dated obituary notice and newspaper articles	Processing some claims	Regional newspapers
☐ Business agreements (i.e., buy-sell agreement, partnership documents)	Providing to attorney	
☐ Certificate of appointment (for estate executor or other fiduciary responsibility)	Processing claims and/or disposing of assets	Probate court
☐ Deceased's employee benefit statements	Determining benefits available to survivors	Employer name and contact:
☐ Retirement plans, brokerage accounts, mutual funds, stocks, bonds, real estate deeds, joint billing statements, automobile registration, other insurance contracts (e.g., fire, homeowners, auto)	Changing beneficiary and names on joint accounts	
☐ Social Security card	Applying for Social Security benefits	
☐ Current bills	Preparing household budget and discussing with attorney	(Possibly in the mail for up to 3 months)
☐ Medicare card	Reporting the death of a Medicare beneficiary	
☐ Driver's license	Settling vehicle and driver's license records	

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193087 (09/19)