

Papers Needed When Someone Dies

Please note that this list is not intended to be legal advice or completely comprehensive; we're trying to provide helpful information to guide you on your journey through the final arrangements after a loved one's death. Some estates, situations, business arrangements, personal affairs, and local laws will require more or less. We hope this list helps you get started!

Papers You Need to Create

- Death certificate (2-3 dozen official copies)
- EIN (Employer Identification Number) for the estate

Identification Papers to Locate

- Driver's license
- Passport
- Any other relevant photo ID
- Social Security card
- Citizenship papers
- Birth certificate
- Marriage license
- Divorce/annulment papers
- Prenuptial agreements
- Military service papers
- Birth and death certificates for other family members

Funeral Arrangement Information

- Any sort of wishes or plans regarding funerals, memorials, or body disposition
 - (Sometimes this information is located in the will)
- Biographical information for obituary and/or eulogy
- Contact information for family, friends, clergy, business associates, and anyone else who would want to be notified about the death and/or funeral

Will & Estate Papers

- Last will & testament
- Revocable living trust
- Durable power of attorney
- Living will
- Durable healthcare power of attorney
- Organ donation papers

Financial Information

- Bank statements
- Brokerage account statements
- Retirement account info (IRA, 401(k), annuity)
- Pensions
- Life insurance policy
- Payable on death accounts
- Stocks and bonds
- Income tax returns

Property Information

- Real estate deeds
- Mortgage statements
- Auto/boat titles
- Storage unit information
- List of valuables
- Safety deposit box information
- Safe combination

Bills (To Pay, Cancel, and/or Get Refunds)

- Mortgage
- Real estate tax
- Electricity
- Gas
- Water/sewer/garbage
- Car payments
- Telephone and cable
- Cell phone
- Online subscriptions (Netflix, Spotify, etc)
- Other subscriptions (Newspaper, magazines, etc)
- Gym membership
- Storage unit
- Post office box
- Safety deposit box
- Credit card bills
- PayPal and other online payment sending/receiving accounts
- Pet related dues/memberships
- Any outstanding debts

Business Information

- Corporation, Partnership, or LLC documents
- Business bank account information
- Business credit cards
- Recurring supplies and deliveries
- List of business assets, including real estate, vehicles, and equipment
- Contracts, including leases, loans, and employee and business contracts
- Business licenses (Federal, state, and local information)
- Business income tax returns