



List of Documents to Gather After Losing a Spouse or Loved One

1. Birth Certificate
2. Passports/IDs including social security card, driver's license, etc.
3. Marriage certificate & any divorce decree(s)
4. Military Discharge paperwork or any records proving service
5. Statements for all bank and investment accounts from the month or quarter of the date of death
6. Any physical stock certificates or paper bonds
7. Any insurance policies (or at least policy declarations) including:
 - Life
 - Health
 - Disability
 - Long-Term Care, etc.
 - Homeowner's/Umbrella/Personal Article Policies
 - Auto/Boat Policy(ies)
8. Death Certificate showing cause of death. (Many financial institutions require it to be "certified" and will not honor a death certificate if the cause still says "pending.")
9. All supporting court documentation regarding the management of the estate including Letters of Executrix and/or Letters of Testamentary/Administration (Many times this must be dated within 90 days-6 months depending on the institution.)

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10. Full and executed copies of any wills, estate planning or trust documents
11. Tax returns from past 2 years including any business or trust returns
12. Any official documents including titles, deeds, liens, etc. Keep in mind if you are having trouble finding them, many people keep these in a safe or a safety deposit box.
13. Mortgage documents
14. Any other loan documents or promissory notes
15. If your spouse owned a business such as an LLC, you may need a copy of their Corporate Resolution or Articles of Incorporation.

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