

CHECKLIST

	Done	Not Applicable
1. COLLECT IMPORTANT PAPERS	<input type="checkbox"/>	<input type="checkbox"/>
Death certificate	<input type="checkbox"/>	<input type="checkbox"/>
Insurance policies	<input type="checkbox"/>	<input type="checkbox"/>
Marriage license	<input type="checkbox"/>	<input type="checkbox"/>
Birth certificates	<input type="checkbox"/>	<input type="checkbox"/>
The will	<input type="checkbox"/>	<input type="checkbox"/>
Veterans' discharge papers	<input type="checkbox"/>	<input type="checkbox"/>
Social Security numbers	<input type="checkbox"/>	<input type="checkbox"/>
Most recent tax returns	<input type="checkbox"/>	<input type="checkbox"/>
2. CONTACT AN ATTORNEY	<input type="checkbox"/>	<input type="checkbox"/>
3. FILE FOR PROBATE OF WILL	<input type="checkbox"/>	<input type="checkbox"/>
4. APPLY FOR BENEFITS	<input type="checkbox"/>	<input type="checkbox"/>
Life insurance proceeds	<input type="checkbox"/>	<input type="checkbox"/>
Retirement plan benefits	<input type="checkbox"/>	<input type="checkbox"/>
Veterans' benefits	<input type="checkbox"/>	<input type="checkbox"/>
Other employee benefits	<input type="checkbox"/>	<input type="checkbox"/>
Social Security benefits	<input type="checkbox"/>	<input type="checkbox"/>
5. CHANGE TITLES AND OWNERSHIP	<input type="checkbox"/>	<input type="checkbox"/>
Home	<input type="checkbox"/>	<input type="checkbox"/>
Insurance policies	<input type="checkbox"/>	<input type="checkbox"/>
Automobiles	<input type="checkbox"/>	<input type="checkbox"/>
Your will	<input type="checkbox"/>	<input type="checkbox"/>
Credit cards	<input type="checkbox"/>	<input type="checkbox"/>
Bank accounts	<input type="checkbox"/>	<input type="checkbox"/>
Stocks, bonds, other investments	<input type="checkbox"/>	<input type="checkbox"/>
Safe deposit boxes	<input type="checkbox"/>	<input type="checkbox"/>
6. COMPLETE NOTIFICATIONS OF DEATH	<input type="checkbox"/>	<input type="checkbox"/>
7. HIRE AN ACCOUNTANT	<input type="checkbox"/>	<input type="checkbox"/>
8. REVIEW FINANCES	<input type="checkbox"/>	<input type="checkbox"/>
9. FILE AND PAY APPLICABLE TAXES	<input type="checkbox"/>	<input type="checkbox"/>