Claim Checklist for Heirs and Executors
Netting & Pace, CPAs

- ☐ Call your trusted CPA or Financial Advisor for guidance and assistance in this difficult time.

- ☐ Request 10-12 certified copies of death certificates so that you will be able to file insurance and Social Security claims and retitle joint assets.

- ☐ Gather important papers and documents including insurance policies, business agreements, income tax forms, checkbooks, military records and membership cards; any of these may entitle you to benefits you are not aware of.

- ☐ Accumulate the paperwork for outstanding debts and promissory notes. Check with lenders to see if any debts carried an insurance rider that would pay the debt in full at death.

Regarding personal information:

- ☐ Retrieve all estate documents.

- ☐ If your family member was a veteran, notify the Veterans Administration to apply for benefits.

- ☐ Contact the employer, if any. Discuss any final or deferred compensation the estate may be entitled to, as well as life insurance, pension and profit sharing benefits, and accident insurance.

- ☐ If there is a safe deposit box, ask your lawyer to advise you about the proper way to retrieve its contents, since laws differ from state to state.

- ☐ It may prove helpful to write to any union, professional or fraternal organization, alumni association and other groups your spouse may have belonged to. Membership might entitle you to death benefits (usually through group life insurance).

- ☐ If you are a surviving spouse, have your name put on all bank and investment accounts and joint property, including any vehicles or real estate that you may own.

- ☐ Cancel unneeded credit cards.

- ☐ Request frequent flyer miles to be transferred.