



2961 Lakeview Drive, Prosper, TX 75078
888.346.2082 or 972.347.2081
Fax 888.355.0888

Loss of Loved One Guide

The loss of a loved one can be difficult and overwhelming. There are many things that go into collecting the legal and financial paperwork required after a loved one has passed. To help, we have created a guide that includes some important documents that may be helpful during this time. Many companies have specific paperwork that will need to be processed. We are here to help you through this process.

Collect

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| <input type="checkbox"/> <i>Death Certificates</i>
Request 20 to 25 copies of death certificates. Insurance, financial, government, and other agencies may need a copy. | <input type="checkbox"/> <i>Other Certificates</i>
This may include birth and marriage certificates, divorce decrees, driver's licenses, and other legal documents. |
| <input type="checkbox"/> <i>Will and/or Trust</i>
Find the decedent's original will or trust, if applicable. This important document may be in a safe deposit box or with an attorney. | <input type="checkbox"/> <i>Insurance Policies</i>
Gather any information on insurance policies. |
| <input type="checkbox"/> <i>Social Security Numbers</i>
Find the decedent's Social Security Number. | <input type="checkbox"/> <i>Financial Documents</i>
Financial statements of IRAs, brokerage accounts, bank accounts, company-sponsored retirement plans, etc. |
| <input type="checkbox"/> <i>Company Benefit Information</i>
Reach out to the decedent's employer for any information they may need from you or may be able to provide for you. | <input type="checkbox"/> <i>Military Discharge Paperwork</i>
Collect the military discharge paperwork, if applicable. |



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Contact

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| <input type="checkbox"/> Financial Institutions
The contact information can be found on the statement for each financial institution. | <input type="checkbox"/> Insurance Companies
These companies may include health, life, accidental death, auto, homeowners, and personal property, etc. |
| <input type="checkbox"/> Credit Bureaus
Send a death certificate to the major credit bureaus: Equifax, Experian, Innovis, and Transunion. <ul style="list-style-type: none">• Equifax.com, 1.800.685.1111• Experian.com, 1.888.397.3742• Innovis.com, 1.800.540.2505• Transunion.com, 1.888.909.8872 | <input type="checkbox"/> Dept./Bureau of Motor Vehicles
Notify the DMV/BMV that the decedent has passed so their records and information can be removed and help protect against identity theft. |
| <input type="checkbox"/> Social Security Administration
1.800.772.1213
www.ssa.gov | <input type="checkbox"/> Internal Revenue Services
1.800.829.1040
www.irs.gov |
| <input type="checkbox"/> U.S. Postal Service
If needed, submit a forward address for the decedent. | |

Review/Transfer

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| <input type="checkbox"/> Utilities and Services
Confirm all bills are changed to the individual responsible for paying them. These may include cellphone, utility, or internet. | <input type="checkbox"/> Memberships or Subscriptions
Change or cancel any membership or subscriptions that may apply. |
| <input type="checkbox"/> Social Media and Email Services
Review each platform's policy regarding removing, memorializing, or transferring the account to a new owner. | |

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