

## Survivor Planning Checklist

Obtain copies of death certificate

Review life insurance policies and contact companies

Contact financial advisors, CPA, attorney, insurance agent

Contact Social Security Administration

Review Veteran or Civil Service benefits

Check for safe deposit box

Review checking account register

Check beneficiary designation for retirement plans and IRA's

Review employer provided benefits – contact former employer

Medical insurance continuation – COBRA possible

Collect real estate deed and titles

Organize bank and investment statements

Review mortgage debt and credit card statements

Find recent tax returns

Review current balance sheet, expense and cash flow projection

Contact local Probate Court

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