

Checklist For Organizing & Settling An Estate



Use this checklist as a useful resource to guide those settling an estate or for estate planning to simplify things for your loved ones at a later date.

Collect Important Papers

	Location/Name	Done	Not Applicable
Funeral and burial instructions		<input type="checkbox"/>	<input type="checkbox"/>
Proof of prepaid funeral or burial arrangements		<input type="checkbox"/>	<input type="checkbox"/>
Death certificate (recommend 15 copies)		<input type="checkbox"/>	<input type="checkbox"/>
Location of safe deposit box/key		<input type="checkbox"/>	<input type="checkbox"/>
Birth certificate		<input type="checkbox"/>	<input type="checkbox"/>
Marriage license		<input type="checkbox"/>	<input type="checkbox"/>
Will		<input type="checkbox"/>	<input type="checkbox"/>
Prenup		<input type="checkbox"/>	<input type="checkbox"/>
Insurance policies		<input type="checkbox"/>	<input type="checkbox"/>
Deeds (home, car, boat)		<input type="checkbox"/>	<input type="checkbox"/>
Trusts		<input type="checkbox"/>	<input type="checkbox"/>
Divorce settlements		<input type="checkbox"/>	<input type="checkbox"/>
Veterans discharge papers		<input type="checkbox"/>	<input type="checkbox"/>
Mortgage		<input type="checkbox"/>	<input type="checkbox"/>
Bills on autopay		<input type="checkbox"/>	<input type="checkbox"/>
Log in information (i.e. email, social media, subscriptions, frequent flyer miles)		<input type="checkbox"/>	<input type="checkbox"/>

Contact Financial Advisor

Financial advisor contact information		<input type="checkbox"/>	<input type="checkbox"/>
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Contact Estate Attorney

	Location/Name	Done	Not Applicable
Attorney's contact information		<input type="checkbox"/>	<input type="checkbox"/>
Date of death values for investment assets		<input type="checkbox"/>	<input type="checkbox"/>
Appraisals for real estate, business, etc		<input type="checkbox"/>	<input type="checkbox"/>

Complete Notification Of Death

Social security administration		<input type="checkbox"/>	<input type="checkbox"/>
Investment advisor for investment accounts		<input type="checkbox"/>	<input type="checkbox"/>
Bank for bank accounts		<input type="checkbox"/>	<input type="checkbox"/>
Employer		<input type="checkbox"/>	<input type="checkbox"/>
Pension administrator		<input type="checkbox"/>	<input type="checkbox"/>

Contact Accountant

Ask about estimated tax payments		<input type="checkbox"/>	<input type="checkbox"/>
Ask about required minimum distributions		<input type="checkbox"/>	<input type="checkbox"/>
Obtain recent tax returns including gift tax returns		<input type="checkbox"/>	<input type="checkbox"/>

Apply For Benefits

Life Insurance (individual and employer)		<input type="checkbox"/>	<input type="checkbox"/>
Retirement plan benefits		<input type="checkbox"/>	<input type="checkbox"/>
Company stock		<input type="checkbox"/>	<input type="checkbox"/>
Social security survivor benefits and death benefit		<input type="checkbox"/>	<input type="checkbox"/>
Veterans benefits		<input type="checkbox"/>	<input type="checkbox"/>
Health insurance, health savings account		<input type="checkbox"/>	<input type="checkbox"/>

Change Title/Ownership

	Location/Name	Done	Not Applicable
IRA and 401k (consult with your financial advisor)		<input type="checkbox"/>	<input type="checkbox"/>
Household bills		<input type="checkbox"/>	<input type="checkbox"/>
Home		<input type="checkbox"/>	<input type="checkbox"/>
Automobiles (leases and insurance)		<input type="checkbox"/>	<input type="checkbox"/>
Credit cards		<input type="checkbox"/>	<input type="checkbox"/>
Safe deposit boxes		<input type="checkbox"/>	<input type="checkbox"/>
Bank accounts		<input type="checkbox"/>	<input type="checkbox"/>
Investment accounts		<input type="checkbox"/>	<input type="checkbox"/>
Mortgage		<input type="checkbox"/>	<input type="checkbox"/>
Property insurance (consult with specialist)		<input type="checkbox"/>	<input type="checkbox"/>

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Clients of the firm who have specific questions should contact their advisor with whom they regularly work. All other inquiries, including any inquiry concerning a potential advisory relationship with Wealthstream Advisors, should be directed to Michael Goodman at mgoodman@wealthstreamadvisors.com.