WEALTHSTREAM
ADVISORS, INC.

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

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

Contact Financial Advisor

Financial advisor contact information		☐	☐

Contact Estate Attorney

Contact Estate Attorney	Location/Name	Done	Not Applicable
Attorney's contact infomation		☐	☐
Date of death values for investment assets		☐	☐
Appraisals for real estate, business, etc		☐	☐

Complete Notification Of Death

Social security administration		☐	☐
Investment advisor for investment accounts		☐	☐
Bank for bank accounts		☐	☐
Employer		☐	☐
Pension administrator		☐	☐

Contact Accountant

Ask about estimated tax payments		☐	☐
Ask about required minimum distributions		☐	☐
Obtain recent tax returns including gift tax returns		☐	☐

Apply For Benefits

Life Insurance (individual and employer)		☐	☐
Retirement plan benefits		☐	☐
Company stock		☐	☐
Social security survivor benefits and death benefit		☐	☐
Veterans benefits		☐	☐
Health insurance, health savings account		☐	☐

Change Title/Ownership

Item	Location/Name	Done	Not Applicable
IRA and 401k (consult with your financial advisor)		☐	☐
Household bills		☐	☐
Home		☐	☐
Automobiles (leases and insurance)		☐	☐
Credit cards		☐	☐
Safe deposit boxes		☐	☐
Bank accounts		☐	☐
Investment accounts		☐	☐
Mortgage		☐	☐
Property insurance (consult with specialist)		☐	☐

WEALTHSTREAM ADVISORS, INC.

Manhattan Office
60 East 42nd St.
Suite 1600
New York, NY 10165

Long Island Office
6800 Jericho Tpk.
Suite 206E
Syosset, NY 11791

Contact
Phone: 212-971-9241
Fax: 212-868-3140