**Sample Surviving Spouse Checklist**

For the Estate of Jane M. Doe:

1. Personal Information:

 Decedent’s Full Name: Jane Marie Doe

 Address: 50 Main Street, Santa Rosa, California 95404

 Social Security Number: 123-45-6789

 Date of Birth: April 18, 1964

 Date of Death: July 7, 2016

2. Family Information:

 Surviving Spouse’s Name: N/A

 Surviving Spouse’s Address: N/A

 Number of Children: 1

 Children’s Names and Addresses: John R. Smith, 123 Sample Drive, Santa Rosa, CA

 Parents’ Names: N/A

 Parents’ Addresses: N/A

 Siblings’ Names: N/A

 Siblings’ Addresses: N/A

3. Estate Documents:

 Will: Yes

 Date Signed: October 1, 2007

 Codicil(s): None

 Date Signed: N/A

 Trust: yes

 Date Signed: October 1, 2007

 Trust Amendment(s): None

 Date Signed: N/A

4. Decedent’s Advisors:

 Financial Planner: N/A

 CPA: Bob Lewis, CPA

 Attorney: David Taylor, Esq.

5. Decedent’s named personal representative: John R. Smith

6. Decedent’s assets:

 Residence: 50 Main Street, value approx. $500,000

 Other real property: None

 Bank Accounts: Bank of America Checking, balance approx.. $4,000

 Brokerage Accounts: Charles Schwab

 Stocks: 1,000 shares of Sample, Inc.

 Bonds: 10 Series EE Bonds

 IRAs: Vanguard IRA, beneficiary John R. Smith

 Annuities: None

 Life Insurance: $10,000 death benefit through employer

 Other:

7. Documents to look for:

* **Deeds, Titles, and Promissory Notes / Loans**
	+ Real Estate Property deeds (including any recent appraisals)
	+ Mortgage or reverse mortgage documents
	+ Promissory Notes or loan documents (including loans owed to the deceased)
	+ Vehicle titles and registrations
* ​**Insurance Policies**
	+ ​Life insurance (including premium payment records)
	+ Accidental life insurance
	+ Veterans’ insurance
	+ Employers or pension insurance
	+ Funeral insurance (or other death-related benefit plans)
	+ Mortgage and/or credit insurance
	+ Credit card insurance (for balances)
	+ Health insurance (including Medicare or Medicaid, “Medigap” insurance, private health insurance, dental, and Long Term Care insurance)
	+ Property insurance (homeowners/renters, car insurance)
	+ Workers’ compensation insurance
* **Financial Accounts** - Including date-of death statements and most recent statements for all accounts and beneficiary designation, if applicalbe.
	+ Bank accounts - checking, savings, CDs
	+ Investment/brokerage accounts, IRAs, 401ks
	+ Stocks and bonds
	+ Annuities
	+ Credit and debit card accounts
	+ User names and passwords for any online accounts
	+ List of safety deposit boxes, where to find keys, and names of authorized users
* **Other Financial Records**
	+ ​​Survivor annuity benefit papers
	+ Employer/retirement benefit (pension) plans, pension/profit-sharing plans
	+ Veterans’ benefit records
	+ Disability payment documents
	+ Income statements for the current year
	+ IRS income tax returns (for the current and previous year)
	+ IRS gift tax returns (for all years)
	+ Property tax records and statements
	+ Business interests held, financial statements and agreements, contracts, etc.
	+ Loan papers
	+ Other - investment records, etc.
* **​Legal Papers**
	+ Will and/or Trusts
	+ Deceased’s Final Instructions, Disposition Authorization, and/or Designated Agent forms (sometimes included in an Advance Directive such as a Durable Power of Attorney for Health Care, or in a Living Will)
	+ Pre-paid funeral contracts
	+ Organ/tissue donation record
	+ Social Security card (or number)
	+ Marriage license or certificate
	+ Military service papers, including discharge records
	+ Domestic Partnership Registration, if any
	+ Court documents for adoptions and divorce
	+ Community Property Agreements
	+ Prenuptial or Postnuptial Agreements
	+ Driver’s license
	+ Passport, citizenship, or immigration papers
* **Personal Information**
	+ Names and contact information of closest family and friends
	+ Names and contact information of all lawyers, accountants, doctors, etc.
	+ Family Tree (if there is no Will or Trust)
	+ User names and passwords for online accounts (including email accounts, financial records, social media accounts, etc.)
	+ Passwords to access computers, cell phones, and other electronic devices