**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