**Surviving Spouse Checklist** **– Instructions**

1. Fill out the name of the deceased person.

2. Fill out information about the deceased person’s vital statistics: full name, birth date, and date and place of death.

3. List the names and addresses of the family members of the decedent: spouse, children, parents, and siblings.

4. List the estate documents that the decedent had, if any, and the date each one was signed.

5. If you know the names of the decedent’s financial advisors, such as his or her financial planner, CPA or tax preparer, and attorney, list their names and contact information.

6. List all of the assets that the decedent owned, as far as you are aware, such as real property, bank and brokerage accounts, IRAs, annuities, stocks, bonds, and life insurance.

7. Review the list of documents to look for to be sure you haven’t missed any important information.