

# A Checklist for When a Spouse or Parent Passes

## Gather Documents and Info:

- |                                       |                                |
|---------------------------------------|--------------------------------|
| Estate documents (will, trust, etc.)  | Car titles or lease agreements |
| Social security card                  | Storage space keys             |
| Any account statements                | Any bills due                  |
| Deeds/Titles to real estate           | Social media information       |
| Digital account passwords             | Letter of instructions         |
| Birth certificates & marriage licence | Military discharge papers      |

## Who to Contact:

- Funeral home to make arrangements
- County clerk or recorder to request death certificates
- Human resources at the person's job
- An attorney for the estate/probate process
- Creditors to resolve/track any recurring debts
- Life insurance company
- Investment/Retirement savings company
- Your accountant/tax advisor

**If you need assistance with this process, [contact us.](#)**