

What to Gather: A Checklist for Families

What's helpful to have on hand if a loved one has passed away or can no longer manage their own affairs.

If a loved one has passed away or become unable to manage their own affairs, here's what's helpful to have on hand:

- A copy of the trust, will, power of attorney, or advance health care directive, if one exists
- A certified copy of the death certificate, if applicable
- Recent statements for bank accounts, investment accounts, and retirement accounts
- Life insurance policy information
- Deeds or title documents for any real property
- A list of known debts, including mortgages, loans, and credit cards
- Recent tax returns
- Contact information for the person's attorney, CPA, or financial advisor, if known
- A list of online accounts (email, financial, and subscription accounts), along with any instructions the person left about access

Not everything on this list will apply to every situation, and it's fine if you don't have all of it right away. Reach out and we can figure out what's actually needed together.