

Certified Copies of Death Certificate

- Suggested Distribution List -

1. **Life Insurance.** A Certified Copy is needed for each insurance policy.
A. _____ B. _____
C. _____ D. _____
2. **Health Insurance.** One Certified Copy may be needed if insurance is employer-provided.
3. **Financial Institutions.** Usually, banks, savings and loans, and credit unions will ask to photocopy a Certified Copy for their records. No Certified Copies are retained.
4. **CD's (Certificates of Deposit).** (See Item #3-financial institutions)
5. **Bonds.** One Certified Copy is required each time U.S. Savings Bonds or corporate bonds are cashed in or transferred.
6. **Stocks.** If held in individual or joint name, a Certified Copy will be necessary for each company where stock is held. If a brokerage house holds the stocks in "street name", only one Certified Copy is required per brokerage house.
7. **IRA's.** One Certified Copy is needed for each financial institution where funds are maintained.
8. **Pension.** There may be a death benefit along with a pension fund. Both the pension and the death benefit may require one Certified Copy.
9. **401k/403b/Retirement Plans.** One Certified Copy for each depository.
10. **Real Estate.** One Certified Copy is needed for each county in which property is titled.
11. **Secretary of State.** Each time a title is changed or transferred, for a car, boat, trailer (anything licensed by the State) a Certified Copy is required.
12. **Current Pay & Vacation Pay.** If still actively employed, you may need one Certified Copy.
13. **Federal & State Income Tax.** If taxes are to be paid in the year of death, you may need one Certified Copy for each return.
14. **Probate.** If there is to be a Probate of the Estate, you may need three or more Certified Copies.

If you require additional Certified Copies, please contact the funeral home.
Please allow several weeks to process the order.