

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.***