

**CERTIFIED DEATH CERTIFICATES** will be needed if any or all of the following items affect the estate of the decedent. Photocopies **may** be accepted **or made** by firms. **BY LAW, only “authorized persons” may order Certified Death Certificates.**

\_\_\_ Social Security (\$255.00 Eligibility? \_\_\_) 1-800-772-1213 to report.

\_\_\_ California D.M.V. (or out-of-state registrations) for car, truck, boat, etc.

\_\_\_ Life Insurance Policies (one D.C. per Insurance Company)

1) \_\_\_\_\_ 2) \_\_\_\_\_ 3) \_\_\_\_\_

\_\_\_ Living Trust (**or any Trust**) to file and retain with Trust papers.

\_\_\_ Funeral Advanced Funding: \_\_\_ Trust \_\_\_ FLIC \_\_\_ Ins. Policy.

\_\_\_ Sole Proprietor Bank Account(s), checking and/or savings.  
(one per Banking Institution)

\_\_\_ Safety Deposit Box(es) (One per Banking Institution)

\_\_\_ Certificates of Deposit (CD's) (One per Banking Institution)

\_\_\_ I.R.S. (if return filed for previous year) Requires IRS form 1310  
Required to change Payee on Joint Filed Returns refund check

\_\_\_ Title(s) to Real Estate or other deeded property

\_\_\_ Stock (One D.C. per Stock Company, unless held in the Trust)

\_\_\_ Bonds (Including U.S. Gov't Savings Bonds)

\_\_\_ Annuities (One per Annuity Company)

\_\_\_ Pension Source(s) and I.R.A. – type accounts (Union Pensions, etc.)

\_\_\_ Medi-Cal benefits (A photo copy, along with written notice of the death, must be mailed to : Director, c/o Department of Health Services, Estate Recovery Unit, P.O. Box 2471 Sacramento, CA 95812-2471)

\_\_\_ Credit Card debt (if insured, or to remit debt)

\_\_\_ Probate Court/Attorney – for legal actions or claims of any kind that involve or might involve the decedent.

\_\_\_ Family and Personal records (never distribute this copy!)

\_\_\_ Other: \_\_\_\_\_

\_\_\_ Total ordered @ \$14.00 each = \$ \_\_\_\_\_ minus \_\_\_ retained by Infinity For Advanced Planning Funds or Insurance Assignment.

\_\_\_ Veteran's Benefits (V.A. provides one FREE)