

CoVantage Credit Union wishes to extend our deepest sympathies to you for your recent loss. Coping with the death of a loved one can be a very difficult time. Closing accounts, settling debts, and finalizing the estate can all cause anxiety for a grieving family. CoVantage understands, and encourages you to utilize this checklist as a resource to alleviate some of this stress.

## Deceased Account Checklist (Note: some items may not be applicable to your situation)

- Original Certified Death Certificate
- Current valid driver's license and contact information for all joint owners.
- Current valid driver's license, social security number, and IRA beneficiary form packet of all IRA beneficiaries
- Open probate case number and county
- Transfer by Affidavit *(Wisconsin residents only, solely-owned assets under \$50,000)*
- Domiciliary Letters *(Wisconsin residents only, solely-owned assets over \$50,000 for personal representative)*
- Letters of Special Administration *(Wisconsin residents only, solely-owned assets over \$50,000 for special administration)*
- Affidavit of decedents successor solely-owned assets under \$1,000 *(Michigan residents only)*
- Petition and order for assignment of solely-owned assets of \$19,000 *(Michigan residents only)*
- Letter of authority for personal representative of solely-owned assets of over \$19,000 *(Michigan residents only)*
- Trust? Name and contact information for trustee:
- Certificate of Trust
- Contact information of personal representative/special administrator of the estate or person handling the assets and liabilities of the deceased (if other than completing this checklist)
- Is the family working with an attorney? If so, attorney contact information:
- Both keys for safe deposit returned if closing box
- Intent:
  - Money: \_\_\_\_\_
  - Collateral: \_\_\_\_\_
  - Loans: \_\_\_\_\_
  - Mortgage: \_\_\_\_\_

### Additional Notes or Questions:

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