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

The following items will be required to finalize the account:

- ☐ Original, Certified Death Certificate
- ☐ Safe Deposit Keys (if Member had a safe deposit box with CoVantage)
- ☐ Trust? Name and contact information for trustee(s)
  - ☐ Certificate of Trust may be applicable when determining updated Trustees

If there are beneficiaries previously designated for the account:

- ☐ Current valid driver's license, of all beneficiaries.
- ☐ IRA beneficiaries - Current valid driver's license and social security number.

If there are **no** beneficiaries previously designated for the account:

Member was a Wisconsin resident:

- ☐ Current, valid identification of the person providing the below document(s).
- ☐ Transfer by Affidavit *(solely owned assets under $50,000)*
- ☐ Domiciliary Letters/ Letters of Special Administration *(solely owned assets over $50,000)*

Member was a Michigan resident:

- ☐ Current, valid identification of the person providing the below document(s).
- ☐ Affidavit of Decendents Successor (solely owned assets under $50,000)
- ☐ Petition and Order for Assignment (solely owned assets of $50,000)
- ☐ Letter of authority for personal representative of solely-owned assets of over $50,000

Member was an Illinois resident:

- ☐ Current, valid identification of the person providing the below document(s).
- ☐ Small Estate Affidavit (solely owned assets under $100,000) - OR -
- ☐ Affidavit of Heirship (solely owned assets under $100,000)
- ☐ Letter of Office (solely owned assets of over $100,000) - OR -
- ☐ Letters of Administration (solely owned assets over $100,000)

If there are loans on the account(s):
Please contact Member Solutions at 800-398-2667, ext. 2404 for debt management assistance.

Additional Notes or Questions:

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