

# Cadence

## Settling an Estate - What You May Need (U.S.)

Settling an estate starts with locating important documents, assets, property and information about the deceased. Try to track down as many of these items as possible (as applicable):

### Legal

- Death Certificate
- Last Will and Testament
- Trust documents
- Beneficiary contact info
- Marriage license
- Divorce/separation papers
- Pre/postnuptial agreements
- Child support papers
- Power of Attorney

### Home/Property

- Vehicle registration
- Lease or rental agreements
- Landlord/tenant Info
- Deeds and titles
- Mineral rights
- Property income statements
- Timeshare agreements

### Taxes

- Tax returns/assessments
- W-2 form
- Property tax bills
- Tax shelter documents

### Government

- Social Security Number
- Driver's license
- Health insurance/benefits ID card
- Birth certificate
- Tribal identification cards
- Passport
- Green card/Permanent resident card
- Immigration/citizenship documents
- Firearm license

### Utilities/Telecom

- Security
- Gas/hydro
- Electricity
- Phone/internet
- Cable/Satellite
- Water

### Business

- Incorporation documents
- Business license
- Shareholder agreements
- Buy/sell agreements

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### Banking

- Safety deposit box
- Statements, agreements
- Debit card, cheques, bank books
- Mortgage information
- Credit card statements
- Lines of credit/loans

### Insurance

- Life insurance policy
- Health insurance policy
- Home insurance policy
- Vehicle insurance policy
- Annuity statements

### Investments

- Investment portfolio
- 401(k)/529 Plan/IRA
- Stocks, bonds and investment certificates
- Certificates of deposit (CDs)
- Annuities
- Crypto wallet
- Mutual funds and ETFs

### Employment/Pensions

- Employment contracts
- Pension/benefit statements
- Government benefits/Social assistance/disability records
- Military service records
- Unemployment records
- Professional/Union memberships
- Workers' compensation paperwork

### Memberships/Accounts

- Accounts held
- Passwords/account numbers
- Accessible parking permit
- Co-operative memberships