

Death Certificate & Post-Death Documents

This section is for your executor to complete after your death.

When someone dies, there are documents that need to be obtained and stored. The most important is the death certificate.

This section provides a place to keep copies of these documents organized and accessible.

For your executor:

After a death, you'll need to obtain several documents. Keep copies here for easy reference.

What documents to store here:

Death certificate. Issued by a doctor or hospital. Required to register the death.

Death Certificate. Issued by the state Vital Records office after the death is registered. Several organizations will ask for a certified copy, so it's common to order a few, and you can usually request more later if you run short.

Letters Testamentary. Issued by the Probate court. Gives you legal authority to administer the estate.

Letters of Administration. If there's no Will, you'll apply for Letters of Administration instead of Letters Testamentary.

Final Tax Return. Once filed and cleared by the IRS.

Tax confirmation (if applicable). Some estates need to confirm tax matters with the IRS before distributing. Whether that applies here, and what form it takes, depends on the estate, so check with the accountant.

Final Estate Accounts. Summary of all assets, debts, expenses, and distributions.

How to use this section:

Attach copies of these documents as you receive them. Keep the originals in a safe place. These copies will be a quick reference when you need to check dates, details, or information.

Space for post-death documents

Your Death Certificate & Post-Death Documents

For your executor: a record of the official paperwork after death.

DEATH REGISTRATION DETAILS

DATE OF DEATH	PLACE OF DEATH
MEDICAL CERTIFICATE (ATTACHED / STORED AT)	REGISTERED WITH (STATE VITAL RECORDS)
DATE REGISTERED	REGISTRATION NUMBER

DEATH CERTIFICATES OBTAINED

NUMBER OF CERTIFIED COPIES	CERTIFICATE NUMBERS
WHERE ORIGINALS ARE STORED	COPIES SENT TO (TRACK DISTRIBUTION)

LETTERS TESTAMENTARY / LETTERS OF ADMINISTRATION

PROBATE / ADMINISTRATION / NOT REQUIRED	DATE APPLIED
COURT	GRANT NUMBER
DATE GRANTED	WHERE ORIGINAL IS STORED

Your Death Certificate & Post-Death Documents (cont.)

LAWYER HANDLING PROBATE

NAME	FIRM
PHONE	EMAIL

FINAL TAX & ESTATE ACCOUNTS

FINAL TAX RETURN FILED (DATE)	IRS CLEARANCE OBTAINED
FINAL ESTATE ACCOUNTS PREPARED	ESTATE BANK ACCOUNT CLOSED

ESTATE CLOSURE & DOCUMENT STORAGE

DATE ESTATE FINALIZED	WHERE ESTATE RECORDS ARE STORED
NOTES: ANYTHING ELSE ABOUT POST-DEATH DOCUMENTS	