

Gathering Documentation (cont.)

- Promissory notes to which decedent was a party
- Partnership agreements, operating agreements and shareholder agreements to which the decedent was a party
- All gift tax returns (Form 709)
- Latest credit card monthly statements
- Additional debt – medical, utility bills
- Any records relating to the value of tangible assets, such as jewelry, art, etc. (such as appraisals or insurance schedules)
- Title to a burial plot
- Titles to automobiles, boats, etc.
- Titles to other personal property
- Trust documents
- Death certificate (see next section)
- Full names, addresses, Social Security numbers and Dates of Birth for surviving spouse and decedent’s children
- Divorce decrees, prenuptial agreements
- Passwords to email accounts, financial accounts
- Annuity contracts and statements

Notifying/Contacting Individuals and Institutions

The executor should notify one or more of the following entities, as appropriate, upon the death of a loved one.

- Dept. of Health & Vital Statistics for copies of death certificate (Ohio 614-466-2531) Obtain multiple **certified** copies (4) of the death certificate for financial institutions, probate estate administration, Social Security Administration, and other applicable institutions. Your funeral home may (or may not) assist with this process.

- Individual holding the decedent's power of attorney
Note: Any power of attorney granted by an individual becomes invalid upon the grantor's death.
- Lessor (Landlord)
If the decedent was leasing property, someone must contact the lessor (landlord) and ask for directions regarding continued use of the property by survivors.
- Service Providers and Memberships
Contact service providers for any recurring monthly service charges that can be discontinued immediately, such as; cable, internet, newspaper and publication subscriptions. Cancel any health and social memberships w/ monthly fees.
- Social Security Administration (Ohio 800-772-1213)
If the decedent was receiving Social Security benefits, someone must contact the administration office to end payment of retirement benefits.
- Any company providing a pension or retirement benefits
If the decedent was receiving pension benefits, someone must contact the appropriate company/entity to end payment of pension benefits.
- Healthcare providers, physicians, eldercare specialists
Any medical providers, physicians, pharmacies, medical equipment providers, or elder care specialists who may have supported medical needs of the decedent prior to his or her death should be notified.

Contact the experienced Probate Attorneys at Carlile Patchen & Murphy to assist you with ALL aspects of Probate Administration or Litigation.

The legacy of your loved one will be protected.

We have two convenient locations to serve you better:

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