Beneficiary Resources

We extend our condolences on your recent loss of a loved one. We recognize this is a difficult time for you. Below please find additional information you may find helpful as you manage this change in your life.

Important Documents

Gathering documents is a necessary step in organizing your personal and financial situation. The specific documents needed vary by individual but the following are commonly necessary:

- Insurance Policies
- Last Will and Testament
- Trust Agreements
- Business Agreements
- Savings and Checking Account Statements
- Financial Statements for Stocks, Bonds, and other Investments
- Real Estate Deeds
- Automobile Titles
- Rental Agreements
- Loan Notes
- Income Tax Returns
- Marriage/Birth Certificates
- Divorce Decrees and Property Settlement Agreements
- Credit Card Accounts

Important documents are commonly stored in safe deposit boxes, briefcases, strong boxes, home and office desks, lockers and safes.

Helpful Contacts

Upon reviewing your personal and financial documents, you will be able to determine who you may need to contact for assistance and what additional benefits may be available to you. Although this varies by individual, potential contacts include:

- Family Attorney
- Financial Advisor or Accountant
- Health Insurance Company
- Past and Present Employers
- Member Organizations (e.g. unions, trade associations, auto clubs, credit unions, etc.)
- Social Security Administration (1-800-772-1213)
- Veterans Administration (1-800-827-1000)
- Internal Revenue Service (1-800-829-1040)
- United Way Support Services (Call Your Local Chapter)

We hope this information is of assistance to you. If you should have any questions about your claim, please contact us at 1-888-658-0193.

If you would like additional information and resources on end-of-life issues, please visit www.LegacyPlanningServices.com.