

# The Documents You Will Need

Before you can file for various benefits and take care of other financial matters, you will need to collect a variety of documents:

- ❑ **Death certificate.** Available from your funeral director or county health department. Purchase at least a dozen certified copies of the death certificate. Most companies will want a certified copy, but to save money use a photocopy when permissible.
- ❑ **Marriage certificate.** Available from the county clerk where the marriage license was issued.
- ❑ **Birth certificates** for the deceased and any dependent children. Available at either the state or county public records offices where the person was born.
- ❑ **Social Security numbers** for the deceased, spouse and dependent children.
- ❑ **Discharge papers.** If the deceased was a veteran, you will need a copy of the discharge certificate. If you cannot find a copy, contact National Personnel Records Center, 9700 Page Boulevard, St. Louis, MO 63132-5200. (Send your request to the attention of the branch in which the deceased served.)
- ❑ **Original Will.** The lawyer who wrote the will may have the original, or it may be with the personal belongings of the deceased or in a safe deposit box. Some banks have special procedures before letting anyone into the safe deposit box.
- ❑ **List of property.** A complete list of what the deceased owned, including real estate stocks, bonds, bank accounts, deeds and personal property.
- ❑ **Recent income tax returns.** If you cannot locate a copy of the most recent income tax return, you need to fill out IRS Form 4506. You will need to attach documentation that you are authorized to act on behalf of the deceased, such as letters from the probate court.



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