FREE PRINTABLE CHECKLIST

After a death: papers to gather and keep

The papers a family is asked for, and where each comes from. Tick each one as you get it, and write down where you put it, so the next person who needs it can find it.

Sources checked on November 27, 2026. Every fact links to the office it came from.

Many organizations ask for a certified copy of the death certificate, so start there. USA.gov

Death certificates

Copies come from the vital records office of the state where the death occurred. Only certain family members, such as a spouse, siblings and children, may be able to get one. Anyone can request one once it becomes public record.

- [ ] **Certified copies of the death certificate**
  A certified copy is needed to notify Social Security and other agencies, to close or transfer bank accounts and credit cards, and to claim a pension.
  Kept where _____

- [ ] **A few photocopies**
  A photocopy is enough for smaller things, like canceling a subscription.
  Kept where _____

- [ ] **If they died abroad: the Consular Report of Death Abroad**
  Issued by the U.S. embassy or consulate for a U.S. citizen. It is used in the U.S. as proof of death, and up to 20 certified copies are free at the time of death.
  Kept where _____

Social Security

Funeral homes generally tell Social Security. If no funeral home is involved, or it doesn't report the death, call Social Security with the details below.

- [ ] **Their name and Social Security number**
  Kept where _____

- [ ] **Their date of birth and date of death**
  Kept where _____

The final tax return

The IRS names these forms for a person who has died.

- [ ] **Form 1040 or 1040-SR for the final return**
  Kept where _____

- [ ] **Form 1310, if claiming a refund**
  Statement of a Person Claiming Refund Due a Deceased Taxpayer.
  Kept where _____

- [ ] **Transcripts from Form 4506-T**
  To check whether returns were filed and to see certain income documents.
  Kept where _____

- [ ] **Returns for earlier years, if they were not filed**
  The IRS says you may have to file those too.
  Kept where _____

If they served in the military

- [ ] **Their military personnel file, including the DD214**
  VA's burial and memorial page points to the official military personnel file.
  Kept where _____

Your own notes

- [ ] **A list of who you have told, and when**
  Kept where _____

- [ ] **Their recent account statements and bills**
  Kept where _____

Official sources

- USA.gov, Dealing with the death of a loved one: www.usa.gov/death-loved-one
- USA.gov, How to get a certified copy of a death certificate: www.usa.gov/death-certificate
- Social Security Administration, What to do when someone dies: www.ssa.gov/personal-record/when-someone-dies
- IRS, File the final income tax returns of a deceased person: www.irs.gov/individuals/file-the-final-income-tax-returns-of-a-deceased-person
- VA, Burial benefits and memorial items: www.va.gov/burials-memorials/

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