DEATH OR INHERITANCE CHECKLIST

When a death occurs it can be a complex and emotional time.

In the event of a death, please reference this list for potential to-do items to consider.

Talk to your financial professional about:

☐ If you receive an inheritance of any kind, talk to your financial professional to discuss potential withdrawal or investment strategies

Additional action items:

☐ Be sure to keep copies of any paperwork establishing you or a loved one as a beneficiary

☐ Obtain and keep a copy of the death certificate for your records

☐ Ensure your contact information for all accounts and policies in which you are a beneficiary have your correct contact information on file

☐ Talk to a tax professional about the tax implications of an inheritance