

# Documents We'll Need

Exactly which documents to locate before your arrangement conference.

## About this checklist

The documents below are the ones we'll ask for during the arrangement conference. You don't need all of them to start — we can begin with whatever is at hand and fill in the rest later. If a document is missing, we can often obtain it ourselves.

## Required for the death certificate

- Full legal name of the deceased (including maiden name)
- Date of birth
- Social Security number
- Place of birth (city, state, country)
- Home address at time of death
- Father's full name
- Mother's full maiden name
- Highest level of education and institution
- Occupation and employer
- Marital status at time of death; spouse's name
- Race and Hispanic origin (for statistical reporting only)

## Required for veteran benefits (if applicable)

- Form DD-214 (certificate of discharge)
- Rank, branch, dates of service
- Discharge status (honorable, general, etc.)
- VA claim number if previously filed

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## Required for Social Security benefits

- Social Security number
- Spouse's Social Security number (for survivor benefits)
- Certified copy of death certificate

## Required for insurance and estate matters

- Life insurance policy numbers and carrier names
- Most recent pension statement
- Most recent bank and brokerage statements
- Will and/or living trust
- Power of attorney documents
- Vehicle titles and registrations
- Real estate deeds
- Most recent tax return

## Nice to have for the obituary and service

- Recent photograph (for obituary and memorial card)
- Biographical notes from family
- List of survivors with relationships
- Religious preference and home congregation
- Any memorial-donation preference

## If a document is missing

We can help obtain: birth certificates, marriage certificates, DD-214s (through the National Archives). We cannot obtain: will documents (these come from the attorney or from the deceased's records). Don't delay calling us over missing documents — we work with partial information every day.