



# Notification of Death Document Checklist

## Set up of the Estate

- Copy of the Death Certificate
- Copy of Letters Testamentary or Letters of Administration
- W-9 signed by Executor with Estate's Tax Identification Number
- Owner Contact Form

## Estate Proceedings with a Will (Testate)

- Copy of the Death Certificate
- Copy of the probated Last Will and Testament
- Order admitting Will to probate
- Copy of Letters Testamentary
- \*Copy of Final Decree or Final Settlement
- \*Copy of the appropriate recorded conveyance
- Documentation of ancillary probate proceedings opened in all affected states or an Affidavit of Heirship (if probate is done in the state where the property is **not** located)
- W-9 for each individual Grantee / Devisee
- Owner Contact Form

## Estate Proceedings with No Will (Intestate)

- Copy of the Death Certificate
- Copy of Letters of Administration / Short Certificate, if applicable
- Judicial (Court) determination of Heirship (TX only)
- Affidavit of Heirship, along with the death certificate, must be recorded in the county where the interest is held (OK owner & non-OK resident)
- \*Copy of the appropriate recorded conveyance



## Notification of Death Document Checklist

- W-9 for each heir or individual listed on the recorded conveyance
- Owner Contact Form

### Death of an Owner as Husband & Wife or Tenants by the Entirety

- Copy of the Death Certificate
- W-9 for the surviving spouse
- Owner Contact Form

### Death of an Owner as Joint Tenants with Right of Survivorship

- Copy of the Death Certificate for the deceased Joint Tenant
- Affidavit of Surviving Joint Tenant(s)
- W-9 for the surviving Joint Tenant(s)
- Owner Contact Form

### Death of an Owner as Life Tenant

- Copy of the Death Certificate
- W-9 for each remainderman
- Owner Contact Form

**NOTE:** In the case of the death of an owner without probate/administration, a recorded Affidavit of Heirship may be accepted in certain circumstances where the account has minimal funds. Additionally, any Affidavit of Heirship must be sworn by a disinterested, non-inheriting person. These are subject to approval in accordance with company policy.

**Oklahoma:** The will must be probated in OK, and the Final Decree must be recorded in the county where the interest is located. For non-Oklahoma residents, a certified Final Decree from an ancillary probate completed in OK must be filed in the county where the interest is held.

**\*\*** The Document may not be required or included when all other requirements are met.