



(336)355-1740

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 27030

## Estate Financial Asset Checklist for Executor

Name of Deceased  
 Deceased BirthDate  
 Deceased SSN#  
 Name of Executor

Name of Institution	Contact Phone Number	Account Number	Date of Initial Notice of Death	Date Ownership Transfer Paperwork Submitted	Date Ownership Transfer Confirmation was Received
Social Security					
Pension					
Bank 1					
Bank 2					
Investment Account 1					
Investment Account 2					
IRA/Retirement Plan 1					
IRA/Retirement Plan 2					
Life Insurance 1					
Life Insurance 2					
Other 1					
Other 2					
Other 3					