

## Survivor Planning Checklist

- Obtain copies of death certificate
- Review life insurance policies and contact companies
- Contact financial advisors, CPA, attorney, insurance agent
- Contact Social Security Administration
- Review Veteran or Civil Service benefits
- Check for safe deposit box
- Review checking account register
- Check beneficiary designation for retirement plans and IRA's
- Review employer provided benefits – contact former employer
- Medical insurance continuation – COBRA possible
- Collect real estate deed and titles
- Organize bank and investment statements
- Review mortgage debt and credit card statements
- Find recent tax returns
- Review current balance sheet, expense and cash flow projection
- Contact local Probate Court

The information provided is not written or intended as tax or legal advice and may not be relied on for purposes of avoiding any Federal tax penalties. MassMutual Life Insurance Company (MassMutual), its employees, or representatives are not authorized to give legal or tax advice. Individuals are encouraged to seek advice from their own tax or legal counsel. Individuals involved in the estate planning process should work with an estate planning team, including their own personal tax or legal counsel.

Martin J. Coursey is a registered representative of and offers securities, investment advisory, and financial planning services through MML Investors Services, LLC. Member SIPC. ([www.sipc.org](http://www.sipc.org))  
Supervisory Office: 2321 Whitney Avenue, Suite 402, Hamden, Connecticut t 203 288.5700.  
Coursey Financial Group is not a subsidiary or affiliate of MML Investors Services, LLC or its affiliated companies.