

# Why We Need Death Certificates

*From experience, we have determined that you may need certified copies of the death certificate for the following purposes:*

- ☐ **Life Insurance** (1 for each insurance company, regardless of the number of policies)
- ☐ **Banks** (1 for each bank, particularly if the account is in the deceased's name only)
- ☐ **Stocks** (1 per company, if held individually or jointly. If held by a broker, 1 for each broker)
- ☐ **Bonds** (1 for each U.S. Savings Bond. Bonds can be re-issued to new co-owners. If you have corporate bonds, you will need 1 per company)
- ☐ **Real Estate** (1 for each county in which property is owned)
- ☐ **Secretary of State** (1 certified copy may be used for automobile, boat and/or mobile home)
- ☐ **IRAs / Individual Retirement Accounts** (1 for each financial institution where funds are maintained)
- ☐ **CDs / Certificate of Deposit** (1 for each financial institution where funds are maintained)
- ☐ **Pension** (1 per pension fund)
- ☐ **Health Insurance** (1 if insurance is provided by an employer)
- ☐ **Current/Vacation Pay** (1 if the deceased was still actively employed)
- ☐ **401K / 403B / Retirement Plans** (1 for each depository)
- ☐ **Federal Income Tax** (1)
- ☐ **State Income Tax** (1)
- ☐ **Local Income Tax** (1)
- ☐ **Probate** (If there is to be a probate of the estate, you will need at least 5 certified copies)

*Should you require additional certified copied of the death certificate, please call us and we will be happy to obtain them for you.*



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