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**CLAIM CHECKLIST FOR HEIRS AND EXECUTORS**

* Call Kevin J. Brand: 972 455 4336.
* Request 10-12 certified copies of death certificate so that you will be able to file insurance and Social Security claims and retitle joint assets.
* Review your important papers and documents including insurance policies, business agreements, income tax forms, bank books, military records and membership cards; any of these may entitle you to benefits of which you are not aware.
* If the deceased was a veteran, notify the Veterans Administration to apply for benefits.
* Contact the deceased's employer, discuss any final or deferred compensation to which you may be entitled, as well as life insurance, pension and profit sharing benefits, and if appropriated, accident insurance, with the employee benefits office.
* Retrieve the deceased's will and request that you lawyer take steps to begin the probate process.
* If the deceased had a safe deposit box in his or her own name, ask your lawyer to advise you about the proper way to retrieve its contents, since laws differ from state to state.
* It may prove helpful to write to any union, professional or fraternal organization, alumni association and other groups to which the deceased may have belonged. Membership might entitle you to death benefits (usually through group life insurance).
* Accumulate the paperwork for outstanding debts and promissory notes. Check with the lenders to see if any debts carried an insurance rider that would pay the debt in full at death.
* Have the deceased's name removed from all joint accounts, investments and joint property, including any vehicles you may own.
* Cancel extra credit cards or convert them to your name.
* Meet with me to review your own Estate Plan.