



Documents Needed and Other Professionals Checklist



Peace of Mind During a Difficult Time

Welcome

Thank you for downloading the After the Fact – Final Affairs, LLC® ***Documents Needed and Other Professionals Checklist***. This ***checklist*** covers those documents you will need to close the estate.

Since each estate is different, this ***Checklist*** will not cover every item for every situation. It's a line item ***Checklist*** that covers issues applicable to most estates.

We hope you find this ***Checklist*** helpful as you prepare to take on the task of closing the estate of your loved one.

If you need further assistance, please visit our website to see how our services may benefit you.

Good luck and our very best to you and your family. Thank you for the opportunity to be of service.

Larry and Tisha Diffie

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Documents Needed

- Adoption Papers
- Birth Certificate
- Certified Copies of Death Certificates
- Citizenship Papers
- Divorce Decree
- Employer Documents
- Marriage License
- Medicaid/Medicare Card
- Military Paperwork/DD214
- Passport
- Post Nuptial Agreement
- Prenuptial Agreement
- Public Assistance
- Social Security Card
- Voter Registration Card
- Wills/Trust/Legal Documents

Other Professionals

- Appraiser
- Assisted Living
- Attorney/Lawyer
- Auto Transportation
- Automotive Services
- Business Consultant
- Computer Services
- Counselors
- CPA/Accountants
- Doctors/Dentists
- Document Storage
- Electrician
- Estate Sales
- Financial Planner/Advisor
- Florist
- Geriatric Care Manager
- Home Health Care
- Independent Living
- Laundry Service

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- Long Term Care Agent
 - Mediator
 - Memory Care Facility
 - Moving Services
 - Nursing Homes
 - Picture Scanning
 - Private Airline Services
 - Real Estate Agent
 - Relocations Services
 - Remodel/Home Repair
 - Retirement Communities
 - Running Errands
 - Shipping Services
 - Stock Broker