



Information Needed for Deceased Account Owners

Note: Power of Attorney (POA) is no longer valid after the death of the individual granting the POA.

After an account holder has passed away, the next steps to be taken are:

1) Gathering necessary documents:

- Original death certificate or certified copy or death certificate
- County Surrogate Letter (Short Certificate), which names executor or administrator of estate.
- Current ID (drivers license, passport, or military ID)

2) Gathering possibly necessary documents:

- A copy of the will
- Special Surrogate form for small estates
- If the decedent lived out of state, it may be necessary to provide a letter that states how long the owner lived in that state.

3) If an account is held jointly, and either the primary or join owner passes away, the account must be closed and a new account may be opened.

4) Funds in IRA account will be distributed as established in the beneficiary designations of the IRA. To submit a claim, an original or certified copy of the death certificate is necessary. The IRA processor explains the beneficiary's options.

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