

# LEGACY

FUNERAL & CREMATION CARE

## Death Certificates

Only a “verification of death” is required to claim social security “lump sum” benefits, or to apply for “survivor benefits.” We will supply this at no charge. Certified Copies of the Death Certificate may be required for the following transactions:

- ♦ The transfer of an individual CHECKING ACCOUNT or a “Joint” checking account if it is in the name of more than one person without “or” “and/or” appearing in the account’s ownership.
- ♦ Transfer of an individual SAVINGS ACCOUNT OF A “Joint” savings account if it is not an “and/or” account.
- ♦ Transfer of an individual SAFE DEPOSIT BOX or a safe deposit box in the name of other parties unless the ownership is taken as “or”.
- ♦ Transfer of each TITLE OF REAL ESTATE OWNERSHIP. This applies to property with the title taken as “Joint Tenancy with the Right of Survivorship.”
- ♦ Transfer of each TITLE OF OWNERSHIP FOR all registered motor vehicles. (Multiple names on the title does not apply if the work “or” “and/or” appears on the title between the names of the registered owners.)
- ♦ One for each LIFE INSURANCE POLICY claim. (If there are multiple policies with one single company, a separate certified copy of the death certificate may be required for each policy number.)
- ♦ One for each claim for BURIAL or FUNERAL INSURANCE plan.
- ♦ One for each death benefit claim from a UNION.
- ♦ Transfer of ownership of STOCK. One for each transaction of the stock is sold or transferred separately.
- ♦ Transfer or redemption of BONDS.
- ♦ Transfer or redemption of TREASURY BILLS (T-Bills).
- ♦ Transfer or redemption of CERTIFICATES OF DEPOSIT (CD’S).
- ♦ Transfer or redemption of MONEY MARKET ACCOUNTS.
- ♦ To “roll-over” an IRA account.
- ♦ Federal and State Tax Returns