

CHECKLIST:

What to Bring to the Bank After a Loved One Passes Away

- ☐ **Certified copies of the death certificate**
- ☐ **Your identification and legal documents proving authority**
- ☐ **Bank account information (statements, checkbooks, cards)**
- ☐ **Key to safe deposit box with location**
- ☐ **Insurance policies and contact information**
- ☐ **Property and asset records (deeds, vehicle titles, investment accounts, brokerage accounts, pensions/retirement plans)**
- ☐ **Outstanding debts and creditor information**
- ☐ **Wills, trusts, and other legal documents**

At INB, we're here to help guide you through the process and help manage accounts after a loved one's passing. When you need us, just reach out to 877-771-2316 or visit inb.com.



We Make Banking Easy
inb.com