



Information Needed for Deceased Account Owners

NOTE: Power of Attorney (POA) is no longer valid on the death of the individual who granted the POA.

In order to complete the process for handling accounts after an account holder has passed away, the following documents are needed:

- Original death certificate or certified copy of a death certificate
- L-8 form, notarized, for Class A beneficiaries
- State form "01" for non-Class A beneficiaries
- County Surrogate Letter from Surrogate Office – NJ residents - naming executor or administrator of estate
- Copy of current ID for person claiming funds

May need the following:

- A copy of the will, if ownership of the account passes through the will rather than by joint ownership or payable on death designation.
- Special Surrogate form for small estates naming specific accounts to be liquidated
- Out of state account owner: A letter that states how long the owner lived in that state

If an account is held jointly and the primary owner passes away the joint account holder may retitle as an individual account or become primary and name a new joint owner.

Funds in IRA accounts will be distributed according to the beneficiary designations in the IRA. An original or certified copy of the death certificate is required to submit a claim. The IRA processor will communicate with the beneficiary or beneficiaries to explain options.