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Ordering and Managing Certified Death Certificates

DIRECT ANSWER Do not order a large stack by guesswork. Make a recipient list, ask each organization whether it needs a certified copy or will accept a scan or photocopy, then order the confirmed total plus a small working reserve.

Start with these priorities

- ☐ **Check the information first:** Review the legal name, dates, place of death, marital information, residence, and other visible facts before sending copies. Report an error promptly.
- ☐ **Build a recipient list:** List the court, insurers, financial institutions, pension or benefit plans, title agencies, and any other organization that may ask for proof.
- ☐ **Ask what each recipient keeps:** Some organizations return a certified copy after review. Others retain it. Record the answer before assigning a certificate.
- ☐ **Protect one clean master:** Keep one certified copy in the secure estate file. Use a working scan for reference, with private identifiers protected.

WAIT BEFORE YOU DO THIS Do not write on, staple, laminate, or separate pages from a certified certificate. Do not mail the only available copy, and do not send a full certificate when a less-sensitive copy will do.

Build the first working estimate

Possible recipient	What to confirm before sending	Working count
Probate court or attorney	Filing requirement, format, and whether the copy is retained	____
Life insurance or pension	Certified copy, upload, or photocopy; one copy per claim or plan	____
Bank, investment, or title office	Account-specific requirement and return policy	____
Government or employer benefit	Whether the death was already reported and whether a claim is separate	____
Reserve	One clean file copy plus a practical backup based on open matters	____

Keep the estimate honest. A blank means the requirement is still being checked; it does not mean the task disappeared.

Put these records in the working file

GATHER Funeral-home order details; the issuing office's instructions; recipient requirement notes; one protected master scan; mailing or upload proof; correction correspondence.

Use the first 30 minutes well

- ☐ Write down how many certified copies have already been ordered or received.
- ☐ List every known recipient and mark the requirement as confirmed or unknown.
- ☐ Call the two organizations with the least-clear instructions before assigning a copy.
- ☐ Number the working certificates and open the use-and-return log.