



SURVIVOR CHECKLIST FOR DECEASED MEMBER ACCOUNTS

We are sorry for your loss. This checklist is designed to help guide you through the next steps for Industrial Federal Credit Union accounts and ensure we can assist you as smoothly as possible during this difficult time.

☐ **Step 1: Notify the Credit Union**

- Notify Industrial Federal Credit Union of the member's passing as soon as possible

☐ **Step 2: Gather Required Documents**

Not all documents apply to every situation.

- Certified copy of the death certificate
- Government-issued photo ID of executor/administrator
- Legal documents to settle the account (such as Letters Testamentary, Letters of Administration, and/or Small Estate Affidavit)
- Trust documents (if applicable)

☐ **Step 3: Meet with an Industrial Federal Credit Union Representative**

- Contact a Member Center to schedule an appointment with a representative
- Meet with a representative to review accounts and next steps

We're Here to Help

Phone: 765-771-8000

Website: www.ifcu.com

This checklist is a general guide. Legal requirements and documentation needs may vary based on individual circumstances. Please contact your legal counsel for personalized assistance.

* This document is not intended for legal purposes.