ROGUE CREDIT UNION™

Settling a Loved One's Accounts

Losing a loved one can be an emotionally challenging time for anyone. Our Member Bereavement Process is designed with empathy and efficiency in mind, and we're here to partner with you as you navigate this aspect of your life. This checklist will help you keep track of documents to gather and what to do next.

Your First Step

Contact our Bereavement Specialist at 541.858.7228 or 833.602.0212.

Establish Authority

To begin the process, we'll confirm that you're authorized to take financial responsibility for your loved one's accounts. We'll need:

- ☐ An original or certified copy of the death certificate
- ☐ Depending on the accounts your loved one had with the credit union, you may need additional documents. Our Bereavement Specialist will help you identify the additional documentation needed, if any.

Gather Documents

After confirming your authority, we can prepare to settle your loved one's accounts. Each state has different rules for what's needed to do this. Start by gathering these documents:

- ☐ An affidavit prepared by a claimant and approved by the county clerk
- ☐ An original or certified copy of appointment papers, like estate documents or court orders from Probate Court
- ☐ An original or certified copy of the trust documentation

This step can be confusing, and you may want to contact an attorney or your county clerk for assistance. While we're here to help, we can't offer legal advice.

Settle Accounts

This final step will look different for everyone because it depends on your loved one's unique financial situation. If additional documents or approvals are needed, we'll reach out to you. In most cases, we'll start by:

- ☐ Returning government deposits received after the date on the death certificate
- ☐ Stopping automatic bill payments and funds transfers

If you have any questions as you move through this process, reach out to our Bereavement Specialist at 541.858.7228 or 833.602.0212. We're here to help.

Notes: