

Fidelity account after death

A preparation checklist for your first notification

Independent organizer, not a Fidelity form. Fidelity sets the records required for your account.

☐ **Start with Fidelity**

Use [Fidelity.com > Managing an inheritance > Your guide to inheriting a Fidelity account](#). Have the deceased person's SSN or taxpayer ID ready for Fidelity's secure process.

☐ **Death certificate**

You can start Fidelity's notification without the certificate. Provide it later if required. Ask which type of copy Fidelity needs.

☐ **Accounts and your role**

Keep recent statements available. Identify brokerage, IRA, workplace, trust or other accounts, and whether you are a beneficiary, surviving owner, trustee or estate representative.

☐ **Confirm the next steps**

Ask for the account-specific document list, submission route and next check-in date. Confirm whether copies, certified records or additional authority documents are needed.

Your follow-up notes

Case reference / contact

Records Fidelity requested

Submission route / next check-in

Keep this sheet private. Do not write full account numbers, passwords or taxpayer IDs on it.

Checked October 6, 2026 against Fidelity's death-notification introduction:
digital.fidelity.com/prgw/digital/journeys/loss/report-a-death

California certificate help and more printables: theestatedesk.com/resources/family-resource-kit/

General information. Follow Fidelity's instructions. No affiliation with or endorsement by Fidelity.