

Please Accept Our Condolences

WE KNOW THE LOSS OF A LOVED ONE CAN BE A DIFFICULT AND OVERWHELMING TIME. OUR STAFF IS HERE TO PROVIDE YOU WITH THE BEST LEVEL OF SERVICE POSSIBLE TO ASSIST YOU WITH YOUR LOVED ONE'S ACCOUNT.

Where to Begin:

Upon notification of the loss of a loved one, we may request that you provide us with the following documentation:

Will Need

- Death Certificate
- Will (If Applicable)

May Need

- Small Estate Affidavit
- Letters of Office
- Valid Photo ID
- Executor Paperwork

Other Considerations:

Does the account have joint membership?

The joint member now assumes sole ownership of the account which may be kept open or may be closed.**

If there is not a joint member, are beneficiaries listed on the account?

The beneficiary may open a new account with the proceeds or they may close the account **

Does the account have a loan?

Disbursement of funds may be delayed.

** All Financial obligations must be paid in full before any funds are disbursed from the account. If none of these options pertain to you, a Member Service Representative will be happy to assist you at any of our branches. You can visit us by walk-in or appointment.

Additional Resources:

Agency

Social Security Administration (SSA)
Department of Veteran's Affairs
U.S. Treasury
Internal Revenue Service (IRS)

Phone Number

800-772-1213
800-827-1000
202-622-2200
800-829-1040

Web Address

www.ssa.gov
www.va.gov
www.treasury.gov
www.irs.gov

Illinois State Credit Union