

# Final Expense Settlement Statement Checklist

Date: \_\_\_\_\_  
Decedent Name: \_\_\_\_\_  
Estate/Account Number: \_\_\_\_\_

## Checklist

Item	Included	Notes
Funeral service invoice/bill	<input type="checkbox"/>	
Cemetery/cremation charges	<input type="checkbox"/>	
Obituary publication costs	<input type="checkbox"/>	
Clergy/officiant fees	<input type="checkbox"/>	
Flowers and memorial materials	<input type="checkbox"/>	
Transportation expenses	<input type="checkbox"/>	
Gravestone/marker payment	<input type="checkbox"/>	
Outstanding medical bills	<input type="checkbox"/>	
Estate administration costs	<input type="checkbox"/>	
Receipts for all paid expenses	<input type="checkbox"/>	

## Summary of Settlement

Total Expenses: \_\_\_\_\_  
Total Paid: \_\_\_\_\_  
Balance Due/Refund: \_\_\_\_\_

## Important Notes:

- Ensure all supporting receipts and documents are attached for verification.
- Final statements should be reviewed and signed by estate representatives.
- Keep a copy of this checklist in the estate records for future reference.
- Only approved and legitimate expenses should be reimbursed by the estate.
- Consult a legal professional if you have questions regarding allowable expenses.