

Prepare for the Post Office visit

Personal preparation notes. This sheet is not USPS Form 3575, an appointment document or a filed change-of-address request.

Keep completed notes in your own files. Leave full Social Security numbers, account numbers and passwords off these sheets.

The request I need to discuss

For ongoing forwarding to another address, USPS directs the appointed executor or administrator to visit a Post Office with proof of authority. A death certificate alone is not enough. [U01]

My relationship and appointed role, if any

Old mailing address

Requested destination

One envelope or ongoing forwarding?

Other people still receiving mail at the old address

Prepare for the Post Office visit (continued)

Documents and questions

USPS asks an authorized agent for their own valid accepted photo ID and documents showing authority. Another accepted address document may be needed if your photo ID lacks acceptable address information. Ask about the document format required for your request. [U04, U07]

Get the USPS paper form at a Post Office. The USPS FAQ says PS Form 3575 can no longer be printed from a home computer. [U04]

Appointment document held and where I keep it

My accepted photo ID and questions about proof of address

Post Office and visit date

Question about document format or remaining household mail

Sources for this sheet: U01, U04, U07. Full citations follow.

Postal and sender follow-up

Use this page for one postal request and one sender contact. Make another copy when you need more space.

A recorded question or reference does not show that a request has been approved.

Post Office request

Keep the requested date separate from the confirmed result. USPS says to retain its confirmation code for changes or cancellation; record where you keep the confirmation letter here. [U04]

Contact date / Post Office

My question

Reply or documents requested

Requested start date

Confirmed result, if received

Where I keep the confirmation letter

Next task and follow-up date

Status choices: Preparing documents / Not contacted / Waiting for a reply / Request made / Confirmation received / Further step needed

Postal and sender follow-up (continued)

Sender contact

A change of address changes USPS routing. USPS says to update agencies, companies and other senders separately. Sender instructions may prevent a piece from being forwarded. [U06, U04]

Sender and official contact route

Contact date and person spoken to

Question / reply

Next task and follow-up date

Status choices: Preparing documents / Not contacted / Waiting for a reply / Request made / Confirmation received / Further step needed

Sources for this sheet: U04, U06. Full citations follow.

Mail and records clue log

Personal clue notes. This sheet records a lead, the official route you checked and the questions still unanswered. It is not an official search, claim or notification form.

A record or name match does not establish a current account, value, ownership or right to claim.

Keep completed notes private. Leave full Social Security or taxpayer identification numbers, passwords and full account or policy numbers off this sheet.

The clue

Date I found this clue

Mail or record type and date on it

Bank, company or sender as printed

Name or partial detail useful for the search

Where the original record is kept

My actual relationship or appointed role

What I checked

A NAIC confirmation records a submitted request. If an insurer finds a match and identifies the requester as the beneficiary, it contacts that person directly. No reply does not establish that no policy exists.

Official route or verified contact I checked

Mail and records clue log (continued)

Date checked and what I actually did

Response or non-sensitive reference, if provided

Still to ask

What is still unknown

Question or document instructions to follow up

My next reminder date (optional)

Print another copy for more clues. Use the separate death-notification log for actual reports and replies.

Sources for this sheet: D01, D03, D04, D05, D06. Full citations follow.

Fictional example: waiting for a reply

All names and details on this page are invented. They do not show an accepted document package or an approved postal request.

The example shows how to keep an unfinished task visible.

Morgan's postal follow-up

Morgan Example is an appointed administrator in this invented example. Morgan has asked the Post Office about the document format it needs before requesting ongoing forwarding. The response is still pending. The real USPS process requires appointment proof and an in-person request. [U01]

Contact: Local Post Office

Contact date: October 13, 2026

Question: Which appointment document and accepted ID should I bring?

Reply: Not yet received

Next task: Obtain the reply before preparing the visit

Status: Waiting for a reply

Separate sender contact

Morgan has also made a note to ask Example Sender about an address update. USPS routing and the sender's records are separate tasks. [U06]

Sender: Example Sender

Question: What process do you use to update the mailing address for this record?

Reply: Not yet contacted

Next task: Find the sender's official contact route

Status: Not contacted

Sources for this sheet: U01, U06. Full citations follow.

Fictional sample: an unresolved clue

All names, the bank and these entries are invented. This sample shows an unresolved clue; it does not record a real search, contact, notification or claim.

Date I found this clue: October 13, 2026

Mail or record type and date on it: Bank statement dated 2022

Bank, company or sender as printed: Example Bank (fictional)

Name or partial detail useful for the search: R. Example

Where the original record is kept: Blue folder marked Old Bank Records

My actual relationship or appointed role: Family member; no court appointment assumed

Official route or verified contact I checked: Not yet checked. Next route: the bank's official contact information

Date checked and what I actually did: Not yet checked or contacted

Response or non-sensitive reference, if provided: None recorded

What is still unknown: Whether the account is open or closed; who may receive information; current ownership and value

Question or document instructions to follow up: Ask which proof is needed for this information request

My next reminder date (optional): October 20, 2026 (personal reminder, not a deadline)

Clue recorded. No account, amount, ownership, authority or benefit eligibility confirmed.

Sources for this sheet: D01, D03, D04, D05, D06. Full citations follow.

Postal branches and source notes

Checked October 13, 2026. Use the official source for your request and ask the Post Office about uncertain document or address situations.

These worksheets do not notify organizations, submit forms or grant access to accounts.

Choose the matching postal branch

Shared address: USPS says you may open and manage the deceased person's mail as needed. Ongoing forwarding to another address requires its separate in-person process and proof of appointment. [U01]

One shared-address envelope: USPS says to cross out your address, add Forward to and the destination, and leave the piece for carrier or collection pickup. This concerns that piece. [U01]

Correct address, previous resident: USPS says to write Not at this address, preserve the address, and return the piece to the carrier or a collection receptacle. Wrong location: return it without adding an endorsement or marking over its information. [U05]

Optional advertising-mail request

ANA's DDNC form checked October 13, 2026 lists a \$6 fee and email verification. ANA sends an updated file monthly to subscribing companies and expects less promotional mail within three months. Coverage and timing are not guaranteed. [F02]

DDNC shares matching information with client organizations to remove names from marketing lists. Read the linked privacy policy before registering. For company-specific mailings, ANA says to contact the company directly. [F02, F03, F04]

Sources for this sheet: U01, U05, F02, F03, F04. Full citations follow.

Sources and official instructions

[U01] How to Stop or Forward Mail for the Deceased. United States Postal Service. Undated; checked October 13, 2026.

<https://www.usps.com/manage/mail-for-deceased.htm>

[U04] Change of Address - The Basics. United States Postal Service. Undated; checked October 13, 2026.

<https://faq.usps.com/articles/Knowledge/Change-of-Address-The-Basics>

[U07] Acceptable Forms of Identification. United States Postal Service. Undated; checked October 13, 2026.

<https://faq.usps.com/articles/Knowledge/Acceptable-Form-of-Identification>

[U06] Standard Forward Mail & Change of Address. United States Postal Service. Undated; checked October 13, 2026.

<https://www.usps.com/manage/forward.htm>

[D01] How to Find a Long Lost Bank Account or Safe Deposit Box. Federal Deposit Insurance Corporation. December 2020; last updated December 14, 2020.

<https://www.fdic.gov/consumer-resource-center/2020-12/how-find-long-lost-bank-account-or-safe-deposit-box>

[D03] Learn How to Use the NAIC Life Insurance Policy Locator. National Association of Insurance Commissioners. May 14, 2025.

<https://content.naic.org/article/learn-how-use-naic-life-insurance-policy-locator>

[D04] NAIC Life Insurance Policy Locator Tool Helps Match Consumers with More Than \$16 Billion in Lost and Unclaimed Benefits. National Association of Insurance Commissioners. September 3, 2026.

<https://content.naic.org/article/naic-life-insurance-policy-locator-tool-helps-match-consumers-more-16-billion-lost-and-unclaimed>

[D05] Search for your unclaimed property (it's free). National Association of Unclaimed Property Administrators. Undated; read October 13, 2026.

<https://unclaimed.org/search/>

[D06] Claim Your Found Property. National Association of Unclaimed Property Administrators. Undated; read October 13, 2026.

<https://unclaimed.org/claim-your-found-property/>

[U05] How is Undeliverable and Misdelayed Mail Handled?. United States Postal Service. Undated; checked October 13, 2026.

<https://faq.usps.com/articles/Knowledge/How-is-Undeliverable-and-Misdelayed-Mail-Handled>

[F02] Deceased Do Not Contact Registration. Association of National Advertisers (ANA). Undated; checked October 13, 2026.

<https://www.ims-dm.com/cgi/ddnc.php>

Sources and official instructions (continued)

[F03] DMAchoice Privacy Policy. Association of National Advertisers (ANA). Updated June 5, 2023; checked October 13, 2026.

https://www.dmachoice.org/static/privacy_policy.php

[F04] DMAchoice Contact Us. Association of National Advertisers (ANA). Undated; checked October 13, 2026.

https://www.dmachoice.org/static/contact_us.php