

Unclaimed Property:

A Quick Guide for Client Reviews & Estates

When to Check for Unclaimed Property

Use this checklist during client meetings, tax prep or estate planning:

- Annual financial checkups
- Address or job changes
- Death in the family or estate work
- Business closures or transitions
- Dormant accounts or uncashed checks

What to Look For

Unclaimed property may include:

- Old checking or savings accounts
- Refunds from insurance, utilities or vendors
- Paychecks or commissions
- Safe deposit box contents
- Stocks or dividends

For Estates & Probate Work

- Search using the deceased person's legal name
- You may need proof of death and relationship
- Claims can be submitted by heirs or executors
- Encourage clients to include unclaimed property checks in estate workflows

How to Search & Claim

In 3 easy steps

1

Visit **YourMoney.OK.gov**
or scan the QR code

2

Enter the name or business

3

If a match is found, follow the instructions to upload the required documents



OKLAHOMA

State Treasurer Todd Russ

wealth is waiting.

