

Transfer on Death Deed Checklist

Action Checklist — ClearLegalTips.com (2026)

Make your TOD deed valid — recording is the step people miss.

Step 1 — Confirm

- ☐ Confirmed your state allows TOD/beneficiary deeds
- ☐ Checked whether your state requires a statutory form

Step 2 — Complete

- ☐ Copied the legal description exactly from the current deed
- ☐ Named a primary and a contingent beneficiary

Step 3 — Execute

- ☐ Signed before a notary
- ☐ Added witnesses if your state requires them

Step 4 — Record

- ☐ Recorded the deed with the county BEFORE death
- ☐ Kept the stamped copy with your estate documents
- ☐ Told your beneficiary where the deed is

INSTRUCTIONS FOR USE

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