

BONUS 1 OF 2

SEARCH A FAMILY MEMBER.

Run the same searches for parents,
grandparents and your spouse, one fillable
page per person.



BEFORE YOU START

Searching is open. Claiming has rules.

Anyone can type a name into a state unclaimed property search. Claiming the money is different: only the owner, or the right person on their behalf, can do that.

If they're living

Show them what you found and let them file the claim themselves on the official site. It's their money and their ID that will be checked.

If they've died

The estate's personal representative or a legal heir usually files, following that state's rules. See Part Three of the main guide.

If they need help

Sit with them while they file, or ask the agency what authorization it accepts. Don't file in someone else's name.

Two searches need their own login

The Dept. of Labor retirement search and the IRS refund tools only work for your own records (marked * on the worksheet). For a parent, they sign in themselves, or contact their old employer's plan.

What to gather for each person

- ③ Full legal name plus every other name they used (maiden name matters most).
- ③ Every state they lived in, and roughly when.
- ③ Employers, especially any with a pension or 401(k).
- ③ Banks and credit unions they used, including ones that closed.
- ③ Whether they served in the military (for the VA insurance search).
- ③ If they've died: the death certificate, which has the details the life insurance locator asks for.

Privacy: don't write anyone's Social Security number on these pages. Official sites ask for it on their own secure forms.

PERSON 1 OF 4

Who I'm searching for

NAME	RELATIONSHIP	BIRTH YEAR

OTHER NAMES (MAIDEN, MARRIED, NICKNAMES)

STATES THEY LIVED IN	CITIES

EMPLOYERS (ANY WITH A PENSION OR 401(K)?)

BANKS & CREDIT UNIONS

☐ Living ☐ Has died ☐ Served in the military

SEARCH	DATE	RESULT	NOTES / CLAIM #
☐ 01 State unclaimed property / MissingMoney		(result)	
☐ 02 Dept. of Labor retirement Lost & Found*		(result)	
☐ 03 PBGC unclaimed pensions		(result)	
☐ 04 Old savings bonds (via state)		(result)	
☐ 05 IRS refunds*		(result)	
☐ 06 FDIC failed banks		(result)	
☐ 07 NCUA closed credit unions		(result)	
☐ 08 HUD FHA refunds		(result)	
☐ 09 NAIC life insurance locator (deceased only)		(result)	
☐ 10 VA life insurance (if they served)		(result)	
☐ 11 DOL back wages		(result)	
☐ 12 Bankruptcy court unclaimed funds		(result)	
☐ 13 FTC / CFPB / SEC refunds		(result)	

* Only works for your own records. Numbers match the sections in the main guide.

NOTES & NEXT STEPS

PERSON 2 OF 4

Who I'm searching for

NAME

RELATIONSHIP

BIRTH YEAR

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CITIES

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NOTES & NEXT STEPS

PERSON 3 OF 4

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NOTES & NEXT STEPS

PERSON 4 OF 4

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RELATIONSHIP

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NOTES & NEXT STEPS

THEIR MONEY, THEIR CLAIM.

1

FREE YEARLY REMINDER

A nudge to search again next year.

lostmoneyscout.com/#remind

2

DID SCOUT HELP?

Optional tip jar, never required.

lostmoneyscout.com/#tip

3

MORE GENX ALLIANCE GUIDES

In Case I Croak, The Sandwich Years and more.

lostmoneyscout.com/#more



GENX ALLIANCE ORIGINALS

The Lost Money Scout · In Case I Croak · The Sandwich Years

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