

CHECKLIST FOR EXECUTOR

Here is a brief checklist with some of the duties you may be required to fulfil as executor. Please note this is not intended to be an exhaustive list of all your requirements and is simply a guide for your reference.

- Notify any insurance companies and financial institution(s) of death of the deceased.
- Check to see whether there are any outstanding loans, mortgages, taxes or other interest on any real estate owned by the deceased.
- Terminate deceased's lease or arrange sublet of premises, if applicable.
- Contact Canada Pension Plan to cancel pension benefits and apply for death benefits, contact Service Canada to cancel Old Age Security benefits.
- Cancel outstanding credit card(s), pending newspaper and magazine subscriptions, telephone, cable TV, internet, club memberships and other such services (i.e., grass cutting and snow removal services).
- Cancel passport with passport office with copy of death certificate; cancel driver's license with copy of death certificate.
- Contact Veterans Affairs Canada if the deceased was a member of the Canadian Armed Forces to determine potential for benefits.
- Obtain full particulars on any annuity contracts and determine whether any guaranteed periods are still in force; check the details of any pension plan to see if any future payments may be made to other family members or the estate.
- Obtain a **Grant of Probate**, if applicable (our office can assist you with this process).
 - You should discuss with the financial institutions whether Probate is required. If the deceased owned any property which is not owned jointly, Probate will also be required.
- If the property is owned jointly, you should consider a Survivorship Request to remove the deceased from the title to the property (our office can assist you with this process).
- Ensure that all valid debts of the estate, income tax owing, funeral and testamentary expenses are properly settled and obtain receipts for all amounts paid.
- File income tax return for the year of death and for any prior years in which a return was not filed and obtain a Tax Clearance Certificate from Canada Revenue Agency. *Under the Income Tax Act, an executor will be personally liable for any interest and penalties that may be payable by an estate if the assets are distributed before obtaining a clearance certificate from the Canada Revenue Agency certifying that all taxes, interest and penalties have been assessed and paid.* (An accountant can assist you with this process).

If you have contacted the applicable organizations and remain unsure whether you require a lawyer's assistance with the estate administration, we offer consultations for a fee.