



The Executor Checklist

The following is a general checklist of some of the more common duties that an executor may be required to deal with:

- ☐ Complete all funeral arrangements and attend to the burial or cremation of the deceased.
- ☐ Locate the original will.
- ☐ Meet with the lawyer that will represent the estate in all legal matters.
- ☐ Take all necessary steps to preserve and protect the assets of the deceased.
- ☐ Locate all of the bank accounts of the deceased and determine the balance on deposit for each account. Notify the bank of the death.
- ☐ Locate all insurance policies, annuities and investments and determine the amount payable for each.
- ☐ Notify the necessary companies of the death.
- ☐ Notify the applicable pension offices of the death.
- ☐ Locate the key of deceased's safety deposit box and prepare an inventory of its contents.
- ☐ Review all personal papers of the deceased in order to locate all assets and debts.
- ☐ Review all real estate documents including deeds, mortgages and leases.
- ☐ Prepare a detailed estate inventory of all of the deceased's assets and debts. Open an estate account for depositing funds received.
- ☐ Arrange for the storage of assets requiring storage and advise insurers of any physical assets of the deceased.
- ☐ Arrange for any insurance coverage required.
- ☐ Notify the beneficiaries named in the will of the death and advise them of their entitlement under the terms of the will.
- ☐ Arrange with the post office for mail to be readdressed, if necessary.
- ☐ Cancel any subscriptions or charge accounts and return or destroy all charge cards.
- ☐ Contact all service clubs and veterans clubs for death benefits that may be payable to the estate.
- ☐ Obtain all unpaid wages and other benefits from the deceased's former employer.

- ☐ Apply to your provincial Court (General Division) for Letters Probate (if there is a will) or for Letters of Administration (if there is no will) and pay all probate fees to the Court.
- ☐ Advertise in a local newspaper with a Notice to Creditors and Others, if necessary.
- ☐ Arrange for the filing of an income tax return for the year of death and for any former years that may not have been filed by the deceased.
- ☐ Apply for Canada Pension Plan benefits if the deceased qualifies for benefits.
- ☐ Apply for civil service, union and veteran's benefits, if applicable.
- ☐ Apply for any amounts payable to the estate under insurance policies.
- ☐ Sell any estate assets, which must be sold, and those which the personal representative chooses to sell, provided that this power is given under the will.
- ☐ Pay funeral expenses, income taxes payable, charge cards, personal loans and any other debts of the deceased.
- ☐ Obtain an income tax refund, if applicable.
- ☐ Pay all money bequests and distribute all other property to the rightful beneficiaries pursuant to the terms of the will and obtain releases from all beneficiaries.
- ☐ Transfer or cancel any insurance policies on the house, car, boat, etc.
- ☐ Obtain reimbursement for all necessary and reasonable expenses incurred in the administration of the estate (with receipts).
- ☐ Pay legal fees and all other outstanding fees relating to the administration of the estate.
- ☐ Pass accounts before a judge of your provincial Court (General Division), if necessary.

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