

Executor's Checklist

Being named an Executor is an important and a somewhat overwhelming job. As an Executor, a deceased friend or family member has entrusted you with the task of seeing that their wishes are fulfilled when they are gone. To aid in this task, we provide the following checklist as a guide to some things you will want to consider as Executor. Although the list may not be exhaustive for every situation, it will provide many suggestions of where to begin, and some of the details that can be forgotten during a time of grief. We hope this checklist will be helpful. Please give us a call at 306.668.7575 if we can be of any assistance.

Tasks	Complete
First Steps	
<ol style="list-style-type: none"> 1. Locate the will and review for any specific instructions regarding the funeral. 2. Check the will and driver's license for any instructions on organ donation. 3. Make necessary funeral arrangements if pre-arrangements have not been made. 4. Ensure that urgent financial needs of immediate family members can be met. 5. Arrange for care of dependants and pets. 6. Obtain multiple copies of death certificate. 	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Contacts	
<ol style="list-style-type: none"> 7. Contact all beneficiaries, including charities, and notify them that they have an interest in the estate. Keep beneficiaries up to date on progress of administering the estate, and likely timeline for completion. 8. Contact relevant advisors, including financial advisor, accountant and lawyer, to notify them of the deceased's passing, and to retain their services in administering the estate. 9. Consult a lawyer to determine if the will needs to be probated. 	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

Notifications

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| 10. Contact Canada Post to have mail redirected. | <input type="checkbox"/> |
| 11. Contact all financial institutions to notify them of the death. | <input type="checkbox"/> |
| 12. Contact Canada/Quebec Pension Plan to cancel pension benefits and apply for death benefits. | <input type="checkbox"/> |
| 13. Contact Social Development Canada to cancel Old Age Security benefits. | <input type="checkbox"/> |
| 14. Cancel outstanding credit card accounts, and inquire about any death benefits that may be included with the card. | <input type="checkbox"/> |
| 15. Return Social Insurance Number (SIN) card to Service Canada. | <input type="checkbox"/> |
| 16. Return passport to Passport Canada. | <input type="checkbox"/> |
| 17. Cancel driver's license, health card, etc. | <input type="checkbox"/> |
| 18. Cancel pending newspaper and magazine subscriptions, telephone, cable TV, internet, club memberships, and other such services. | <input type="checkbox"/> |
| 19. Contact employer to see if any salary and other benefits, such as sick leave, are owing and what death benefits may be expected. | <input type="checkbox"/> |
| 20. Contact Veteran's Affairs Canada, if the deceased was a member of the Canadian Armed Forces, to determine if any benefits are available. | <input type="checkbox"/> |

Identification and Safeguarding of Assets

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| 21. Review contents of safe deposit box and make listing of contents. | <input type="checkbox"/> |
| 22. Take possession of any cash, securities, other valuable papers, jewelry, property deeds, mortgages, insurance policies and other title papers and documents. | <input type="checkbox"/> |
| 23. Obtain keys or change locks to control access to home and other properties. | <input type="checkbox"/> |
| 24. For vacant properties (including foreign property), ensure all relevant bills are paid (power, electricity, property taxes, etc), and arrange for maintenance, protection and care of the property. | <input type="checkbox"/> |
| 25. If decedent was sole occupant of rental premises, terminate lease or sublet. | <input type="checkbox"/> |
| 26. Obtain valuations for household goods, valuable art, collections, furniture and automobiles, and arrange for adequate insurance coverage of these items as well as on any real estate held by the deceased. | <input type="checkbox"/> |

<p>40. File income tax return for the year of death, as well as any optional returns, and for any prior years in which a tax return was not filed.</p> <p>41. File any tax returns required for assets held outside of Canada (vacation properties, etc), including those required by the IRS.</p> <p>42. Pay all income tax due or obtain an income tax refund, as applicable.</p> <p>43. Obtain tax clearance certificate from Canada Revenue Agency.</p> <p>44. Settle the bills of the estate: creditors, funeral expenses, and other expenses.</p> <p>45. Obtain final invoices from advisors, lawyer, accountant, and pay these prior to estate distributions. Also pay executor's fees.</p>	<p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p>
<p>Distribution of Estate Assets</p>	
<p>46. Distribute personal items as instructed in the will and obtain receipts.</p> <p>47. Pay legacies and transfer bequests as provided in the will and obtain receipts.</p> <p>48. Establish trusts as directed by the will and invest trust assets accordingly.</p> <p>49. Distribute any remaining balances to residual beneficiaries in accordance with the will and obtain receipts.</p> <p>50. Prepare an account of all assets, liabilities, expenses, and distribution of estate assets and present it to the beneficiaries to sign for approval.</p> <p>51. Close the estate bank account and safe deposit box.</p>	<p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p>