

Executor Checklist



The next steps after someone passes away.

Immediately

- Locate and review the Will or any other supporting documents regarding funeral, burial, etc.
- Make proper arrangements that follow the deceased's wishes
- Approve organ donation if applicable
- Secure assets (home, business, cars, etc.)
- Arrange for the care of children and/or pets

The Following Days

- Obtain proof of death, or death certificate
- Cancel credit and debit cards
- Cancel all government cards (driver's license, passport, health card, SIN)
- Cancel all subscriptions and membership cards
- Cancel benefits such as CPP, OAS, pensions, etc.

The Following Weeks

- Contact and meet with an estate lawyer
- Complete list of the deceased assets

- Review the Will and supporting documents with the beneficiaries
- Ensure proceeds from RRSP, TFSA, life insurance, etc. are paid to the estate or the designated beneficiaries
- Contact deceased's creditors to arrange payment of debts
- Notify banks, financial advisors, accountants, insurance
- Apply for government death benefit
- Notify utility companies
- Arrange for payment of recurring expenses
- Start making a list of the deceased assets
- Review any legal actions in which the deceased was involved
- Apply for probate
- Collect debts owing to the estate
- Sell / distribute assets as directed by the Will
- Maintain meticulous records of all actions taken on behalf of the estate
- File outstanding tax returns
- File terminal tax return
- File estate tax return
- Obtain a tax clearance certificate
- Apply for executor compensation if applicable
- Distribute residual estate assets
- Obtain releases from beneficiaries

Need Help?

Contact Candace Gellea CFP, CIFP, at (306) 773-7285 or email cgellea@starkmarsh.com