

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 Robert Montague CFP®, CIM, at 519-822-2610 or email rmontague@royalcityic.ca.