

Executor Checklist



Some things you'll need to do after someone passes away.



Immediately After

- Review the Will or any instructions left regarding funeral, burial, cremation, etc.
- Make proper arrangements in accordance with the deceased's wishes
- Approve organ donation (if applicable)
- Secure valuable assets such as home, cottage, and/or business
- Arrange temporary care of children and pets

In the Following Days



- Obtain death certificate or proof of death
- Cancel subscriptions and memberships
- Cancel credit and debit cards
- Cancel passport, driver's license, health card, social insurance number
- Cancel benefits such as CPP, Old Age Security, pensions, etc. (if applicable)
- Apply for government death benefits
- Notify utility companies
- Notify banks, accountants, financial advisors, insurance companies
- Arrange for payment of recurring expenses and bills
- Start making a list of the deceased's assets
- Contact an estate lawyer

In the Following Weeks



- Meet with estate lawyer
- Ensure proceeds from life insurance, RRSP, TFSA, etc. are paid to estate or designated beneficiaries
- Complete list of deceased's assets
- Obtain valuations
- Review the Will with estate beneficiaries
- Contact deceased's creditors to arrange payment of debts
- Review status of any legal actions in which the deceased was involved
- Apply for probate

In the Following Months



- Transfer ownership of assets to the estate
- Collect debts owing to the estate
- Sell assets as directed by the Will or as otherwise required
- Distribute specific assets or gifts to beneficiaries as instructed under the Will
- Maintain records of all actions taken on behalf of the estate
- File outstanding tax returns
- File terminal tax return
- File estate tax returns
- Obtain a tax clearance certificate
- Apply for executor compensation, if applicable
- Distribute residual estate assets
- Obtain releases from beneficiaries