

Executor Checklist

- Make funeral arrangements
- Locate the will
- Apply for a Death Certificate
- Apply for a Wills search
- Check the safety deposit box
- Publish a notice to creditors (not mandatory)
- Make a detailed inventory of assets and debts
- Open an estate account for depositing funds received
- Obtain available cash
- Send in change of address form to post office
- Notify any pensions
- Notify the banks
- Apply for Canada Pension Plan benefits
- Review all personal papers of the deceased
- Review all real estate documents (deeds, mortgages, and leases)
- Notify old age pension offices (federal and provincial)
- Cancel subscriptions, charge accounts, etc.
- Transfer or cancel any insurance policies on property (car, house, or other)
- Notify the beneficiaries named in the Will and advise them of their entitlement
- Arrange the filing of the final income tax return and any years that have not been filed
- Fill out Statement of Assets and Liabilities
- 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