



# Executor Checklist

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One of the fundamental obligations of an Executor is to protect the assets of the deceased's estate. The following checklist is intended to provide a good overview of some of the principal tasks. You will need to seek out the appropriate professional (e.g. tax, legal etc) for more advice on the various activities you may be required to perform in your role as an executor.

- Locate and review will
- Make funeral arrangements if necessary
- Notify beneficiaries
- Obtain death certificate and certified/notarial copies (most organizations will require original documentation)
- Apply for Letter of Probate/Letters of Administration if required
- Advertise for creditors if necessary
- Locate all statements and information about assets and liabilities (e.g. bank accounts, investments, insurance)
- Notify appropriate financial institutions and insurance companies of the death
- Review the last cheques written by the deceased and establish if they will be paid by the financial institution
- Open an estate account if required; to make deposits and pay bills, as appropriate
- Access and list the contents of deceased's safety deposit box
- Cancel the deceased's credit and debit cards (cancel preauthorized payments and direct deposits)
- Determine amounts payable under life insurance policies if any and apply within any time limitations
- Contact the deceased's current and former employers for any existing pension or survivor benefits
- Apply for the CPP death benefit and survivor pension for a spouse or dependents
- Contact 3<sup>rd</sup> parties such as; CPP, OAS and veteran's affairs to cancel benefits, the post office to redirect mail, cancel provincial health card, SIN card, driver's license, etc.
- Notify Accountant and advise of death and arrange for preparation and filing of final tax returns
- Pay any tax owing, funeral expenses, legal fees, debts, outstanding fees related to estate etc.
- Contact CRA upon receipt of the Notice of Assessment and apply for Clearance Certificate
- Distribute the estate's assets

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