

Executor's Guide

Executor's Checklist

This checklist is a broad overview of executor tasks, listed somewhat in order to be completed. Identify and check off the tasks that would be required, and then complete those that are required.

Action	Required	Completed
Plan the funeral	<input type="checkbox"/>	<input type="checkbox"/>
Locate important documents	<input type="checkbox"/>	<input type="checkbox"/>
Will	<input type="checkbox"/>	<input type="checkbox"/>
Marriage contract(s)	<input type="checkbox"/>	<input type="checkbox"/>
Real estate title(s)	<input type="checkbox"/>	<input type="checkbox"/>
Car ownership	<input type="checkbox"/>	<input type="checkbox"/>
Review and understand the will	<input type="checkbox"/>	<input type="checkbox"/>
Obtain proof(s) of death	<input type="checkbox"/>	<input type="checkbox"/>
Collect documents	<input type="checkbox"/>	<input type="checkbox"/>
Notify	<input type="checkbox"/>	<input type="checkbox"/>
Creditors	<input type="checkbox"/>	<input type="checkbox"/>
Beneficiaries	<input type="checkbox"/>	<input type="checkbox"/>
Service Canada	<input type="checkbox"/>	<input type="checkbox"/>
CRA	<input type="checkbox"/>	<input type="checkbox"/>
Financial institutions of the deceased	<input type="checkbox"/>	<input type="checkbox"/>
Employer	<input type="checkbox"/>	<input type="checkbox"/>
Friends/family	<input type="checkbox"/>	<input type="checkbox"/>
Identify, compile, and secure assets (document everything)	<input type="checkbox"/>	<input type="checkbox"/>
Re-direct the mail, email, and text messages	<input type="checkbox"/>	<input type="checkbox"/>
Apply for probate (if required)	<input type="checkbox"/>	<input type="checkbox"/>
Identify CRA filings, make filings, and pay taxes	<input type="checkbox"/>	<input type="checkbox"/>
T1 terminal income tax return	<input type="checkbox"/>	<input type="checkbox"/>
T1 optional income tax return(s)	<input type="checkbox"/>	<input type="checkbox"/>
T3 income tax return(s)	<input type="checkbox"/>	<input type="checkbox"/>
Older unfiled T1 income tax return(s)	<input type="checkbox"/>	<input type="checkbox"/>
T2 corporate income tax return(s)	<input type="checkbox"/>	<input type="checkbox"/>
GST/HST return(s)	<input type="checkbox"/>	<input type="checkbox"/>
Pay debts	<input type="checkbox"/>	<input type="checkbox"/>
Cancel the passport	<input type="checkbox"/>	<input type="checkbox"/>
File for and obtain CRA clearance certificate	<input type="checkbox"/>	<input type="checkbox"/>
Consider hiring experts (eg: accountant, lawyer, appraiser, etc)	<input type="checkbox"/>	<input type="checkbox"/>
Communicate with beneficiaries regularly	<input type="checkbox"/>	<input type="checkbox"/>
Expected timeframes	<input type="checkbox"/>	<input type="checkbox"/>
Achieving milestones	<input type="checkbox"/>	<input type="checkbox"/>
Reasons for delays	<input type="checkbox"/>	<input type="checkbox"/>
Details of executor remuneration	<input type="checkbox"/>	<input type="checkbox"/>
Distribute assets to beneficiaries	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>