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Executor’s Check List

The following are steps that are often taken after a death occurs. The main purpose of this section is to call attention to the many steps and decisions that the Executor must take.

***Immediate Duties:***

 **Notes**  **Completed**

1. Locate the Will (name location)
2. Make or Pre- Plan Funeral Arrangements:
3. Review Financial Affairs:

***Protect The Estate:***

Remember to cancel the following:

1. Health Insurance Coverage:
2. Driver’s License:
3. Cable:
4. Telephone:
5. All Credit Cards:

(Please Note – Outstanding balances on credit cards, bank line of credits, loans, and mortgages, may be covered by insurance. Before you pay balance, check to see if balance is insured)

1. Subscriptions:
2. Club Memberships:
3. Redirect Mail/ Register change of address with Post Office:
4. Ensure Safe Custody of Personal Valuables and Important Documents:
5. Apply to the Estates Court for “Probate”. This means getting the Will authenticated so assets can be sold or transferred.
6. Pay the Probate Fees:

***Value the Estate:***

Contact the following to determine assets and liabilities and determine whether a notarized copy or an original death certificate is required.

1. Financial Institutions – List Name and Location(s) of institution(s):
2. Brokers – List Name & Locations:
3. Insurance Companies – List Name & Locations:
4. RRSP/RRIF Trustees:
5. Miscellaneous: