

Executor Checklist

- Obtain original Will;
- Determine who will act as executor or administrator of the estate and whether or not anyone will renounce as executor (ie. non-resident etc);
- Keep a diary of all decisions made, steps taken, financial transactions, and a time log if claiming executor compensation;
- Contact funeral home to make arrangements;
- Order a death certificate – these may be ordered through the funeral home or directly from BC Vital Statistics (we find 2 originals are sufficient as certified copies can be made at our office);
- Consider publishing an obituary;
- Conduct wills search by contacting BC Vital Statistics Agency (this can be done at our office if probate/letters of administration is being applied for);
- Locate estate assets and if applicable, safety deposit box; secure estate assets and ensure adequate insurance coverage is in place;
- Probate – if required, apply to the Court for a Grant of Probate when the deceased died with a Will or Letters of Administration when the deceased died without a Will (our office can assist with the application or review documents if you choose to draft your own);
- Keep a record of payments made on behalf of the estate. The banks will pay many of the household and funeral expenses directly out of the deceased's accounts;



- Notify hydro, cable, telephone and other utilities to change the name on bills or change service;
- Government Benefits – call Service Canada to notify them of the death and make application, where eligible, for the death benefit (max. \$2,500);
- Veterans Affairs – if the deceased was receiving Veterans Affairs benefits, call Veterans Affairs;
- Pension Plan Benefits – if the deceased received pension benefits, extended health and dental benefits from a pension plan, contact the pension plan administrator to advise of the death and to determine eligibility for continued benefit coverage for dependents;
- Contact Canada Post to redirect mail, if applicable;
- Driver's Licence – cancel deceased's driver's licence;
- Passport – cancel deceased's passport. You can return/cancel the passport at Service Canada office;
- Social Insurance Number – cancel deceased's Social Insurance Number by returning the SIN card with a copy of the death certificate to Service Canada;
- Check the deceased's computer for accounts, passwords, online business presence, digital assets and social media;
- Auto registration and insurance – Contact ICBC (Autoplan broker) or private insurer, if applicable, to cancel or change car insurance. You will need to provide a certified copy of the death certificate and Will and possibly a letter from your lawyer or a certified copy of the Grant of Probate;
- Life insurance – contact life insurance company to obtain benefits, if applicable;



- Financial institutions – contact banks and other financial institutions to remove deceased’s name from joint accounts or to transfer accounts held solely by the deceased’s name into the name of the estate;
- Credit Cards – contact credit card companies to remove deceased’s name from accounts or to cancel accounts;
- Debts – determine debts and claims against the estate;
- Publication of Notice to Creditors – Contact BC Gazette to arrange for publication of notice to creditors;
- Real Property – contact notary or lawyer regarding removing deceased’s name from title to property where jointly held; if deceased’s name only, probate will be required;
- Income Taxes – contact an accountant to file required income tax returns and apply for clearance certificate;
- Accounting to Beneficiaries – prepare detailed accounting of receipts and disbursements during administration of the estate and obtain approval from beneficiaries or the Court;
- Distribution of Assets – distribute personal and household effects, pay bequests and make distribution of estate to beneficiaries according to the terms of the will or *Wills, Estates & Succession Act* of British Columbia, as applicable;
- Contact a lawyer regarding general estate questions, applying for the Wills Notice Search, advertising to creditors in the BC Gazette and procedures for probate or letters of administration, if required;
- Breathe!