Harper Grey LLP

General Checklist for Executor

These suggestions are for general purposes only and may not all apply to the estate that you are administering. Find the most recent contact information for the organizations listed below by visiting their websites.

Sandra Abley
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- [ ] Review Will – if any – to understand the instructions
- [ ] Determine who will act as executor or administer (and consider if you want to renounce)
- [ ] Obtain notarized copies of the original Will from a lawyer if needed
- [ ] Maintain notes and records of all decisions made, steps taken and financial transactions
- [ ] **Memorial Society of BC**
  Contact the Memorial Society of BC to see if the deceased was a member who has already pre-paid for funeral services
- [ ] Contact a funeral service provider to make funeral arrangements
- [ ] Consider publishing an obituary
- [ ] **BC Medical Services Plan**
  Contact BC Medical Services Plan to cancel MSP coverage
- [ ] **BC Vital Statistics**
  Order original Death Certificates by contacting BC Vital Statistics, if the funeral service provider is not doing this for you (you will need to provide these to various government agencies, financial institutions and other service providers)
- [ ] **BC Vital Statistics**
  Conduct a Wills Search by contacting BC Vital Statistics if your lawyer has not already done so
- [ ] **Veterans Affairs**
  Notify Veterans Affairs, if necessary, to receive advice about Veterans Affairs benefits and pension
- [ ] **Canada Post**
  Contact Canada Post to redirect mail, if necessary
- [ ] **Service Canada**
  Contact Service Canada to:

  (a) Notify them of the death;

  (b) Obtain instructions to cancel the Social Insurance Number;

(c) Ask questions regarding the deceased's Canada Pension Plan, Old Age Security, Seniors' Supplement; and

(d) to inquire about other benefits (such as the $2,500 death benefit)

- [ ] **Utility/Cable/Internet/Phone**
Notify all utility companies to change the name on the bills or to cancel/change services

- [ ] **Employer Pension Plan Benefits**
Contact the deceased's former employer to report the death and obtain information about continued benefits for dependents, including extended health benefits

- [ ] **ICBC**
Cancel the deceased's drivers licence and cancel/change motor vehicle insurances

- [ ] **Title Searches**
Obtain and review recent title searches to determine if there are outstanding mortgages, liens or property tax deferrals in respect of real property and seek legal advice, if needed

- [ ] **Passport Canada**
Cancel and return the deceased's passport in accordance to instructions on the Passport Canada website

- [ ] **Life Insurance**
Contact life insurance companies to obtain benefits, if any

- [ ] **Financial Institutions**
Remove the deceased's name from joint bank accounts or to transfer accounts into the name of the estate and to cancel credits cards

- [ ] **Debts and Claims of the Estate**
Examine and pay debts and claims against the estate and defend any legal action against the estate

- [ ] **BC Gazette**
Publish notice to creditors, if needed

- [ ] **Income Taxes**
Contact an accountant about the deceased's final return and tax returns for the estate, if needed. Inquire about the need for clearance certificates.

- [ ] Locate estate assets (discussed in more detail in another checklist)

- [ ] Secure estate assets and ensure adequate insurance coverage is in place for real property, vehicles, jewelry, art and water crafts (discussed in more detail in another checklist)

- [ ] **Grant of Probate**
If needed, apply to Court for a Grant of Probate when the deceased died with a Will (or a Grant of Administration if the deceased died without a Will) by yourself or with the assistance of a lawyer

- [ ] **Accounting to Beneficiaries**
Prepare a detailed accounting of expenses, receipts and disbursements during the administration of the estate for approval by the beneficiaries or by the Court if your lawyer is not assisting you with this

- [ ] **Releases and Consents**
If needed, instruct your lawyer to prepare Releases and Consents for the beneficiaries to sign to confirm that they will not start any legal action against the executor and estate

- ☐ **Distribute the Assets of the Estate**
  Distribute personal and household effects, pay cash legacies make distributions to beneficiaries in accordance to the terms of the Will or the Wills, Estates & Succession Act, as applicable

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Sandra is Associate Counsel with Harper Grey practising with our Wills & Estates and Business Law Groups. Her practice is focused on wealth management and preservation. Please contact her if you have any questions. Please contact her if you have any questions.

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