

EstateExec™ Generic Executor Checklist for Canada

Serving as the executor of an estate can be a challenging responsibility and require significant effort over time: the average executor [spends hundreds of hours fulfilling his or her duties](#), over 3 - 12 months.

To help you understand your specific duties, EstateExec can automatically create a customized executor checklist and assign appropriate due dates (see [Tracking Tasks](#)) depending on the particulars of the estate. For example, different provinces have different rules about creditor notification, family support, probate, and more.

At a simple level, though, the following generic checklist covers the basic responsibilities of an executor:

Done	Task	Due
<input type="checkbox"/>	Notify close friends & family	First Week
<input type="checkbox"/>	Notify employer	First Week
<input type="checkbox"/>	Secure assets	First Week
<input type="checkbox"/>	Arrange funeral	First Week
<input type="checkbox"/>	Locate the will	First Week
<input type="checkbox"/>	Notify Veterans Affairs Canada (VAC)	First Week
<input type="checkbox"/>	Order death certificates	First Week
<input type="checkbox"/>	Optionally retain lawyer	First Month
<input type="checkbox"/>	Protect unoccupied property	First Month
<input type="checkbox"/>	Cancel unneeded services	First Month
<input type="checkbox"/>	Notify Service Canada	First Month
<input type="checkbox"/>	Notify Canada Revenue Agency (CRA)	First Month
<input type="checkbox"/>	Request Trust Account Number (TAN)	First 3 Months
<input type="checkbox"/>	Inventory assets	First 3 Months
<input type="checkbox"/>	Determine heirs	First 3 Months
<input type="checkbox"/>	Start probate process if required/desired	First 3 Months
<input type="checkbox"/>	Notify heirs	First 3 Months
<input type="checkbox"/>	Establish family allowance if applicable	First 3 Months
<input type="checkbox"/>	Forward mail	First 3 Months
<input type="checkbox"/>	Notify life insurance companies	First 3 Months
<input type="checkbox"/>	Notify RRSPs and similar beneficiary accounts	First 3 Months
<input type="checkbox"/>	Notify RCMP about firearms	First 3 Months
<input type="checkbox"/>	Notify credit cards	First 3 Months
<input type="checkbox"/>	Notify other agencies	First 3 Months
<input type="checkbox"/>	Notify extended acquaintances	First 3 Months
<input type="checkbox"/>	Open estate bank account	First 3 Months

<input type="checkbox"/>	Consider online media accounts	First 3 Months
<input type="checkbox"/>	Publish notice of death	First 3 Months
<input type="checkbox"/>	Debt claims deadline expired	As Possible
<input type="checkbox"/>	Inventory debts	As Possible
<input type="checkbox"/>	Determine estate solvency	As Possible
<input type="checkbox"/>	Plan asset allocation	As Possible
<input type="checkbox"/>	Conduct estate sale (if desired)	As Possible
<input type="checkbox"/>	All debts resolved	As Possible
<input type="checkbox"/>	Dispose of unwanted assets (if applicable)	As Possible
<input type="checkbox"/>	Pay local property taxes	Calendar Year
<input type="checkbox"/>	Submit final decedent income tax returns (T1)	Tax Year
<input type="checkbox"/>	Submit estate income tax forms (T3)	Tax Year
<input type="checkbox"/>	Obtain CRA tax clearance certificate	Finish
<input type="checkbox"/>	Make all distributions	Finish
<input type="checkbox"/>	Compensate executor	Finish
<input type="checkbox"/>	Pass accounts for probate	Finish
<input type="checkbox"/>	Close estate bank account	Finish

Note that the above generic checklist is useful, but it is not intended to be an exhaustive list, and some of the due dates may vary a bit from province to province.

If you use the EstateExec interactive task checklist, you will be able to click on each task and get more information about it, as well as see actual due dates for your particular estate — you can [explore a sample estate and its associated interactive checklist here](#), or you can simply [create your own estate](#). You should also keep in mind that the majority of EstateExec's long-term utility lies in its ability to track and manage assets, debts, and cash, and to optionally share that information with heirs.

See www.EstateExec.com/ca/