

EXECUTOR RESPONSIBILITIES

One of the fundamental obligations of an Executor is to protect the assets of the deceased's estate. The following checklist is intended to provide an overview of some of the principal tasks. You will need to seek out appropriate professional services (e.g. tax, legal etc.) for advice on the various activities you may be required to perform in your role as an executor.

Note: This document is to be considered a resource and may not contain all tasks and responsibilities.

Tasks	
1. Locate and review Will.	
2. Make funeral arrangements (if necessary).	
3. Notify beneficiaries.	
4. Obtain death certificate and certified/notarial copies (most organizations will require original documentation).	
5. Apply for Letter of Probate/Letters of Administration, if required.	
6. Advertise for creditors (if necessary). A notice may be published in the BC Gazette or local newspapers to creditors and other claimants requiring them to present their claims against the estate of the deceased person to the personal representative within a specified period of time (not be less than 30 days from the date of the publication) stating that after the specified period the personal representative proposes to distribute the estate, having regard only to the claims of which the personal representative then has notice.	
7. Locate all statements and information about assets and liabilities (e.g. bank accounts, investments, insurance).	
8. Notify appropriate financial institutions and insurance companies of the death.	
9. Review the last cheques written by the deceased and establish if they will be paid by the financial institution.	
10. Open an estate account if required; to make deposits and pay bills, as appropriate	
11. Access and list the content of deceased's safety deposit box.	
12. Cancel the deceased's credit/debit cards and cancel preauthorized payments and direct deposits.	
13. Determine amounts payable under life insurance policies if any and apply within any time limitations.	
14. Contact the deceased's current and former employers for any existing pension or survivor benefits.	
15. Apply for the CPP death benefit and survivor pension for a spouse or dependents.	
16. Contact 3rd parties such as; CPP, OAS and veteran's affairs to cancel benefits, the post office to redirect mail, cancel provincial health card, SIN card, driver's license, etc.	
17. Notify accountant and advise of death and arrange for preparation and filing of final tax returns.	
18. Pay any tax owing, funeral expenses, legal fees, debts, outstanding fees related to estate etc.	
19. Contact CRA upon receipt of the Notice of Assessment and apply for Clearance Certificate.	
20. Distribute the estate's assets.	

Useful Contacts:

<p>Death Certificates To order a death certificate, do one of the following:</p>	<ul style="list-style-type: none">• Apply online or by fax using your credit card: https://ecos.vs.gov.bc.ca/ In BC: Toll-free 1.888.876.1633 Outside of BC: 250.952.2681• Apply by mail by downloading and completing an Application for Death Certificate or Registration Photocopy (VSA 430D) form (PDF, 1.21MB) with payment to: Vital Statistics Agency PO Box 9657 Stn Prov Govt Victoria, B.C. V8W 9P3
<p>Search of Wills Notice To order a Search of Wills Notice (you will need to provide a Death Certificate – see above) apply online or by fax using your credit card:</p>	<ul style="list-style-type: none">• http://www.vs.gov.bc.ca/admin/credit.html In BC: Toll-free 1.888.876.1633 Outside of BC: 250.952.2681
<p>Canada Pension/Old Age Security/Guaranteed Income Supplement To notify the government of the deceased's passing and deal with any government pension deposits:</p>	<ul style="list-style-type: none">• Human Resources Development Canada Toll-free: 1.800.277.9914 http://www.servicecanada.gc.ca/eng/services/pensions/cancel.shtml

Frequently Asked Questions:

Q. What is the difference between an Executor and Administrator?

A. An executor is appointed in the Will of the deceased and an administrator is an individual who applies to the courts to administer the estate of a deceased person who did not leave a Will.

Q. What is a Grant of Probate?

A. A legal document issued by the Court confirming the validity of a Will and the executors named in it.

Q. What are Letters of Administration?

A. A legal document that gives the authority to administer the estate of someone who has died without making a Will.

Q. Can the funeral expenses be paid from the deceased's account?

A. Yes. With an invoice from the funeral home or a receipt as proof of payment, funeral expenses can be paid from the deceased's account, provided there are funds available.