

Executor Checklist

Being named as an Executor means you are responsible for carrying out a loved one's wishes, settling their estate, and ensuring everything is handled properly. The process can feel overwhelming, but it helps to think of it in a few clear steps.



Find and confirm the Will

- Locate the Will (or determine next steps if there isn't one).
- Connect with an estate lawyer or notary to confirm your role and what's required in your province.

Make funeral arrangements

- Support the family with funeral or memorial plans.
- Request several copies of the death certificate – you'll need them later.

Get professional help

- Executors often work with lawyers, accountants, or financial advisors.
- Professional fees are paid from the estate.

Notify key people and organizations

- Let beneficiaries, banks, insurance companies, and government agencies know about the death.
- Cancel or transfer services such as utilities, subscriptions, or memberships.

Handle legal and tax requirements

- File the Will for probate (or verification) if required.
- Pay any outstanding debts and file final income tax returns.
- Wait for clearance from the Canada Revenue Agency before making distributions.

Distribute the estate

- Pay professional fees and settle any claims.
- Share the remaining assets with beneficiaries as outlined in the Will.

Keep records

- Track expenses, decisions, and distributions.
- Executors are accountable to beneficiaries, so accurate records are important.



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