



604-926-5121 or info@mckenziefuneralservices.com

Executor`s Check List

The following are steps that are often taken after a death occurs. The main purpose of this section is to call attention to the many steps and decisions that the Executor must take.

Immediate Duties:

- | | <u>Notes</u> | <u>Completed</u> |
|--|--------------|--------------------------|
| 1) Locate the Will (name location) | _____ | <input type="checkbox"/> |
| 2) Make or Pre- Plan Funeral Arrangements: | _____ | <input type="checkbox"/> |
| 3) Review Financial Affairs: | _____ | <input type="checkbox"/> |

Protect The Estate:

Remember to cancel the following:

- 1) Health Insurance Coverage:

- 2) Driver`s License:

- 3) Cable:

- 4) Telephone:

5) All Credit Cards:

(Please Note – Outstanding balances on credit cards, bank line of credits, loans, and mortgages, may be covered by insurance. Before you pay balance, check to see if balance is insured)

6) Subscriptions:

7) Club Memberships:

8) Redirect Mail/ Register change of address with Post Office:

9) Ensure Safe Custody of Personal Valuables and Important Documents:

10) Apply to the Estates Court for “Probate”. This means getting the Will authenticated so assets can be sold or transferred.

11) Pay the Probate Fees:

Value the Estate:

Contact the following to determine assets and liabilities and determine whether a notarized copy or an original death certificate is required.

1) Financial Institutions – List Name and Location(s) of institution(s):

2) Brokers – List Name & Locations:

3) Insurance Companies – List Name & Locations:

4) RRSP/RRIF Trustees:

5) Miscellaneous:
