

Checklist for Executors and Beneficiaries

1. The following documents may be required for settling the estate:

- Physicians Statement
- Claimant's Statement (completed by beneficiary)
- Funeral Director's Statement of Death (Prepared by Funeral Home)
- Death Certificate*
- Copy of Will (Obtain from Family Lawyer)
- Marriage Certificate*
- Birth Certificate*

*copies of these documents can be obtained from:

Vital Statistics Agency

Location: 818 Fort Street, Victoria BC V8W 1H8
Phone: 250-952-2681
Website: <http://www.vs.gov.bc.ca/>

2. Name of Lawyer: _____

Telephone: _____

3. Name of Executor: _____

Telephone: _____

4. Place of Employment: _____

Contact the Human Resource Department and review:

- Pension Plan Money
- Accumulated Vacation Pay
- Bonus or Commission Money
- Group Insurance Money
- Group Insurance Carrier

Agencies to Contact

5. Service Canada (CPP & OAS, E.I.)

- Advise CPP and OAS of Death
- If the deceased was receiving E.I. Benefits, the Estate may be eligible for monies
- **Apply for Survivor's Benefit or Children's Benefit
 - copy of Death Certificate and Birth Certificate will be required
 - **If there is no Will, marriage certificate or Statutory Declaration (if common-law) will be required.

Location: 1401 Douglas Street, Victoria BC or 3179 Jacklin Road, Victoria
Mailing: Box 1177 Victoria BC V8W 2V2
Phone: 1-800-277-9914 or 1-800-206-7218

6. Canada Revenue Agency

- Prepare and file and Income Tax Return for the deceased, covering the period from the beginning of the year to date of death. (Due April 30, of the year following death)
 - Social Insurance Number required _____

Location: 1415 Vancouver Street, Victoria BC V8V 3W4
Phone: 1-800-959-8281

7. ICBC Licensing Unit

- Cancel driver's license or BC Identity card

Location: 955 Wharf Street, Victoria BC or
#1 – 1150 McKenzie Ave Victoria, BC
Mailing: PO Box 3750, Victoria BC V8W 3Y5
Website: <http://www.icbc.com/driver-licensing/getting-licensed/>

8. Veteran's Affairs – Bureau of Pensions Advocates (BPA)

- If the deceased has served in the Armed Forces and is entitled to any benefits

Location: 320 – 1321 Blanshard Street, Victoria BC
Phone: 1-877-228-2250

9. Worker's Compensation – Worksafe BC

- If the deceased was collecting benefits from Worker's Compensation

Location: 4514 Chatterton Way, Victoria BC
Mailing: PO Box 4700 Stn Terminal, Vancouver BC V6B 1J1
Phone: 1-888-967-5377

Insurance and Investments

10. Life, Disability and Critical Illness Policies

Contact Life Insurance Broker: _____

Phone: _____

Contact DI/CI Insurance Broker: _____

Phone: _____

Insurance Company	Policy No.	Date Contacted	Cancelled
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>

Note: some disability and critical illness policies may provide a return of premium or a small death benefit.

11. Investment Accounts – transfer ownership/beneficiary claim

Contact Financial Advisor: _____

Phone: _____

Category	Account No.	Carrier	Date Contacted

12. RRSP & Annuities

- Contact Financial Advisor: _____
 Phone: _____

Policy No.	Carrier	Date Contacted

13. RRSP contributions

- Contribution to a spousal plan can be made in the year of death or during the first 60 days after the end of that year.

14. Pensions from other companies or Countries

- Contact pension plan administrator

Plan No.	Plan Administrator	Date Contacted

15. General Insurance Policies – home, auto, other

- Contact Insurance Broker: _____
 Phone: _____

Insurance Company	Policy No.	Date Contacted	Cancelled
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>

Banking and Financial

16. Contact Bank or Trust Companies

- Inform them of death
- Transfer ownership of accounts
- Open safety deposit box
- Is there a bank loan?

DO NOT change from joint account until all of deceased's cheques are deposited.

Bank or Trust Company	Account No.	Date Contacted

17. List Credit Cards

Credit Card Company	Account No.	Date Contacted	Cancelled
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>

18. List Outstanding Bills to be paid

Company	Account No.	Date Paid	Amount Paid

Household and Home

19. Mortgage on house (if existing)

- Contact Mortgage Company: _____
Phone: _____

20. Land Titles Office

- Transfer title on property

21. Utilities – BC Hydro

- Cancel or transfer
Location: 4400 West Saanich Rd Victoria BC
Phone: 1-800-224-9376 or 604-224-9376

22. Telephone

- Cancel or transfer account

23. Mobile Phone

- Cancel or transfer account

24. Vehicle Registration

- Transfer Ownership of vehicles

25. Fraternal Organizations and memberships

- List and contact them advising them of the death

Organization	Date Contacted