

Being an Executor of someone's estate is a huge responsibility. However, where does one start and what is required?

There are many details to the settling of an estate. Creating a clear and comprehensive filing system right from the beginning will save time and stress. Please note I am providing information as best I can however, please contact a Lawyer while performing your duties. Information subject to changes.

As an Executor, there are some duties to be completed and you've been granted the full legal authority and responsibility to administer the estate. Some of these duties can include:

- Assessing the value of the assets
- Arranging for payment of any debts or taxes owing
- Protecting and securing assets and identify liabilities ie.(real estate, investments, property, vehicles, personal property)
- Filing for benefits
- Notifying creditors, tenants, income providers and others
- Applying for Probate
- Cancelling any regular services and suppliers
- Distributing bequests to the beneficiaries
- Filing the final tax return
- Establish and managing any Trusts in place
- Fulfilling any other instructions and requests found in the Will.

Documents that may be required and best to gather information in advance in preparation if applicable:

- Will and notarized copies
- Death certificate and copies
- Birth Certificate
- SIN Card
- Driver's Licence
- Passport
- Marriage certificate, Common Law, contracts, agreements including Separation if applicable
- Health card
- Bank cards
- Credit Cards
- Insurance documents
- Rental or Lease agreements
- Shareholder agreements
- Trust or estate documents
- T-1 Tax returns from previous three years

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