

What to do When Someone Has Died: A Checklist

- **Please Note: The typical estate takes a minimum of two years to complete to CRA's requirements.**
- Determine who will act as executor or administrator of estate;
- Maintain a record of all decisions made, steps taken and financial transactions;
- Contact funeral service provider to make funeral arrangements;
- Consider publishing an obituary (Times Columnist, tel: 250-386-2121);
- Locate estate assets and safety deposit box, if applicable;
- Secure estate assets and ensure adequate insurance coverage is in place;
- Notify post office to redirect mail, if applicable;
- Obtain a death certificate and conduct wills search by contacting BC Vital Statistics Agency, tel: 604-660-2937;
- Review will, if applicable;
- Obtain probate or letters of administration from court, if required;
- Call Service Canada to notify of the death and to obtain information regarding Canada Pension Plan, Old Age Security and related benefits, tel: 1-800-277-9914;
- If the deceased received pension benefits, extended health and dental benefits from a pension plan, contact the pension plan administrator to advise of the death and to determine eligibility for continued benefit coverage for dependents;
- Contact Passport Canada to cancel deceased's passport, tel: 1-800-567-6868;
- Contact Social Insurance Registration to cancel deceased's Social Insurance Number, tel: 1-800-206-7218;
- Notify Canada Revenue Agency of the death and cancel benefit payments in the name of the deceased, tel: 1-800-959-8281;
- If the deceased was receiving veteran's benefits, call Veterans Affairs Canada, tel: 1-866-522-2122;
- If the deceased was receiving the Seniors supplement or disability benefits for seniors, call the BC Seniors Line, tel: 1-800-465-4911;
- Cancel deceased's Driver's License at local ICBC Driver Licensing Office, tel: 1-800-950-1498;
- Contact local ICBC Autoplan broker, or private insurer if applicable, to cancel or change car insurance;
- Contact life insurance company to obtain benefits, if applicable;
- Contact financial institutions to remove deceased's name from joint accounts or to transfer accounts held solely by the deceased into the name of the Estate;
- Contact credit card companies to remove deceased's name from accounts or to cancel accounts;
- Notify phone and utility companies to change the name on bills or change the service;

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- Contact Land Title Office regarding removing deceased's name from title to property, tel: 1-877-577-5872;
- Contact BC Gazette (and local newspaper) to arrange for publication of notice to creditors, tel: 1-800-663-6105;
- Examine claims against estate and defend any legal action against estate of deceased;
- Contact an accountant to file tax returns and apply for clearance certificate;
- Pay debts;
- Prepare detailed accounting of assets as well as receipts and disbursements during administration of the estate;
- Obtain approval of financial statement from beneficiaries or court;
- Distribute personal and household effects;
- Pay legacies and make partial distribution to beneficiaries according to terms of the will or Estate Administration Act of BC, as applicable (ensure have signed release from each beneficiary first);
- Obtain clearance certificate from Canada Revenue Agency;
- Complete final distribution; and
- Contact a lawyer regarding general estate questions and procedures for probate or letters of administration, if required.