

Executor Checklist

- Locate will
- Determine who will act as Executor or Administrator of the Estate
- Obtain a death certificate and conduct wills search by contacting BC Vital Statistics Agency
1.888.876.1633 or <http://www2.gov.bc.ca/gov/content/life-events/death-and-bereavement>
- 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
- Notify insurance agency (house insurance) and get vacancy coverage if needed
- Call Service Canada to notify of the death and to obtain information regarding Canada Pension Plan, Old Age Security and related benefits | *1.800.277.9914 or <https://www.canada.ca/en/services/benefits/publicpensions/cpp/cancel-cpp.html>*
- If the deceased was receiving GST rebates, contact CRA
1.800.959.1953 or www.cra-arc.gc.ca/tx/ndvdl/lf-vnts/dth/menu-eng.html
- If the deceased was receiving Child Tax credits contact CRA
1.800.387.1193. or www.cra-arc.gc.ca/tx/ndvdl/lf-vnts/dth/menu-eng.html
- Cancel deceased's Driver's License at local ICBC Driver Licensing office
1.800.950.1498 or <http://www.icbc.com/driver-licensing/getting-licensed/Pages/cancel-retire-licence.aspx>
- Contact local ICBC Autoplan broker, or private insurer if applicable, to cancel or change car insurance
- If the deceased was receiving veteran's benefits, call Veteran's Affairs Canada
1.866.522.2122 or www.vac-acc.gc.ca/clients/sub.cfm?source=bereavement/death
- If the deceased was receiving the senior's supplement/disability benefits, call the BC Seniors Line
1.866.866.0800 or <http://www.eia.gov.bc.ca/programs/other.htm>
- Contact Medical Services Plan to confirm MSP coverage has been terminated
604.683.7151 or www.health.gov.bc.ca/msp/infoben/faqas.html#death
- Contact Passport Canada to cancel deceased's passport
1.800.567.6868 or www.servicecanada.gc.ca/eng/lifeevents/loss.shtml
- Contact Social Insurance Registration to cancel deceased's Social Insurance Number
1.800.206.7218 or www.servicecanada.gc.ca/eng/sin/protect/death.shtml
- Complete and submit an income tax Clearance Certificate to CRA
<http://www.cra-arc.gc.ca/tx/ndvdl/lf-vnts/dth/clmc-eng.html>
- Search Unclaimed Property for any unclaimed balances
<http://unclaimedpropertybc.ca/>
- Notify post office to redirect mail, if applicable
- Locate and list the contents of safety deposit box

If there's anything we can do to help, please let us know.

Call 1.888.440.4480 or visit prospera.ca.