

ESTATES CHECKLIST

In order to advise you regarding estate administration, I need to know about the deceased, the family of the deceased and about the property of the deceased.

So before you come to see me for our first meeting, make sure you have all the information required below.



Zivkovic Wills and Estates

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ESTATES CHECKLIST:

PEOPLE

Names, addresses and contact information for:

- The Deceased
- Deceased's spouse and children
- Deceased's dependents
- Beneficiaries
- Executors

DOCUMENTS

- Original death certificate
- Original Will

ASSETS OF THE DECEASED

- List of automobiles and boats (if any)
- List of antiques, artwork, jewellery of significant value
- Real estate - Deed/Transfer confirming ownership, address, original cost, approximate current fair market value
- Bank accounts - Information about each bank account (bank address, account number, ownership of account, approximate balance)
- Life insurance - Information about each policy of life insurance (name of company, policy number, type of plan, named beneficiary)

ASSETS OF THE DECEASED (continued)

- RRSPs, RIFs, pensions and annuities - Information about each account (name of company, contract number, type of plan, named beneficiary)
- RESPs, RDSPs - Information about each account (name of company, contract number, type of plan, named beneficiary)
- Investments - Information about all stocks and/or bonds, their original costs, estimated market values and names of registered owners.
- Property in other jurisdictions (details)
- Owned businesses - Incorporation documents, corporate minute book, shareholder or partnership agreements

LIABILITIES OF THE DECEASED

- Mortgages - amount owing, names of mortgagees, are they insured?
- Other debts - amount owing, names of creditors