



WHAT TO BRING TO YOUR ESTATE APPOINTMENT

1. **PERSONAL INFORMATION ABOUT YOU** including:

The Executor or Administrator must provide 2 pieces of ID (1 government issued photo ID [Drivers Licence, Passport, etc.] and one other piece)

Full legal name
Address, telephone numbers and e-mail address
Occupation
Social Insurance Number

2. **INFORMATION ABOUT THE DECEASED** that you may be aware of:

Full legal name (including any aliases)
Address at date of death
Date and place of birth
Date and place of death
Occupation or former occupation
Maiden name (if applicable)
Social Insurance Number
Marital Status
Name of spouse (if applicable) (if spouse is deceased, date of death)
Names, addresses and dates of birth of children (if a child is deceased, date of death and names, addresses and dates of birth of his or her children)

3. **INFORMATION ABOUT THE BENEFICIARIES**

Full legal names, addresses and dates of birth of beneficiaries (if a beneficiary is deceased, date of death and names, addresses and dates of birth of his or her children)
If beneficiary is a minor the name and address of the parent / legal guardian

3. **DOCUMENTS**

Original Death Certificate
Original Will (if one exists or a copy of the Will)
Any other documents you think are relevant to the estate
Uncashed cheques / cash on hand or in Deceased's wallet

4. **SUMMARY OF ESTATE ASSETS** (the lawyer will ask questions about estate assets):

Real estate - copies of property assessments
Bank accounts - copies of statements
Investment accounts (including RRSP, RRIF, TFSA) - copies of statements
Pension accounts
Life Insurance
Vehicles – copies of registration papers for motor vehicles or boats
CPP and OAS monthly payment benefits (if applicable).
Is the Deceased entitled to unpaid wages? If so, name and address of employer will be required.
Outstanding loans payable to the Deceased

5. **SUMMARY OF ESTATE LIABILITIES** (the lawyer will ask questions about estate liabilities such as mortgages, personal loans, lines of credit, personal guarantees, etc.):

8. **OTHER THINGS TO CONSIDER:**

Do you have an accountant to assist you in the preparation and filings of the Deceased's tax returns and any estate tax returned that may be necessary? If so, the name and address of that accountant.