RDM LAWYERS LLP

YOUR LAWYERS FOR LIFE

WHAT TO BRING TO YOUR ESTATE ADMINISTRATION APPOINTMENT

1. PERSONAL INFORMATION

- **Two pieces of ID:** one must be a government issued photo ID (e.g., driver's license or passport)
- Full legal name
- Address, telephone numbers and email address
- Occupation
- Social Insurance Number

2. INFORMATION ABOUT THE DECEASED

- Full legal name (including any aliases), and maiden name (if applicable)
- Address at date of death
- Date and place of birth
- Date and place of death
- Occupation or former occupation
- 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/her children

2. INFORMATION ABOUT THE BENEFICIARIES

- Full legal names
- Addresses
- Dates of birth
- If a beneficiary is deceased: date of death, and names, addresses and dates of birth of his/her children
- If a beneficiary is a minor: name and address of the parent/legal guardian

3. DOCUMENTS

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

4. SUMMARY OF ESTATE ASSETS

- Real estate: copies of property assessments
- Bank accounts: copies of statements
- Investment accounts (including RRSPs, RRIFs, TFSAs): 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)
- If the Deceased is entitled to unpaid wages: name and address of employer
- Outstanding loans payable to the Deceased

5. SUMMARY OF ESTATE LIABILITIES

- Mortgages, lines of credit
- Personal loans, personal guarantees

6. OTHER THINGS TO CONSIDER

- If you have an accountant to assist you in the preparation and filings of the Deceased's tax returns and any estate tax returns that may be necessary: name and address of the accountant

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LAWYERS

Brian J. Loughlin
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Brian is a partner at RDM Lawyers LLP and has over 30 years of experience advising clients on wills, trusts, estates, family business succession, and estate planning matters.

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Sheri is a partner with RDM Lawyers LLP and focuses her practice on business law, real estate and advising her corporate clients on estate planning matters.

Marta Dean
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Marta is an associate with RDM Lawyers LLP. She has been practicing law since 2010 and focuses primarily on advising clients on estate planning (wills, trusts, powers of attorney, etc.) and estate administration.

Kam S. Grewal
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Kam is an associate with RDM Lawyers LLP and advises on wills, trusts, estates and corporate matters. He is a registered trust and estate practitioner (TEP) and a certified executor advisor (CEA).

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Jeevan is an associate with RDM Lawyers LLP and advises clients on estate planning and estate administration matters, while also practicing in the areas of real estate and business law.

ASSISTANTS

Our dedicated staff assist with the preparation of Wills, Enduring Powers of Attorney, Representation Agreements, and Trusts, and assist executors and administrators with estate administration matters including the preparation of applications for Grants of Probate and Grants of Administration. Our paralegal, Carol Reid, brings over 35 years of experience to the team.

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At RDM Lawyers LLP, we have the experience to assist you with your wills, trust, and estate planning needs, from the simple to the complex. We also have the skill, empathy, and professionalism necessary to navigate you through the complicated issues that may arise when administering an estate.