

Division of 1476228 Ontario Ltd.
1576 London Line, Sarnia, ON N7T 7H2
Telephone: 519-542-5541 Fax: 519-542-5542
www.smithfuneralhome.ca
Scott D. Smith, Manager

ESTATE CHECKLIST

This checklist is a general guide to the many duties that you, as an estate representative, may be required to fulfil.

1. Locate will and review to determine whether there are any special funeral directions. Ascertain whereabouts of beneficiaries.
2. Upon receiving funeral account, take to the bank, with the Proof of Death Certificate, to arrange payment. Most institutions will issue a draft payable to the funeral home.
3. Assist in making funeral arrangements, if necessary.
4. Obtain "Funeral Director's Proof of Death" (or apply for Provincial Death certificate if required.) We at **Smith Funeral Home** can provide you with the necessary application form for the provincial certificate.
5. List contents of the safety deposit box.
6. Arrange for safe custody of personal valuables.
7. Review adequacy of property insurance coverage and alter if necessary.
8. If deceased lived in a rental property, terminate lease or arrange to sublet.
9. We at **Smith Funeral Home** can provide you with documentation to apply for the Canada Pension Plan Death Benefits, Survivors Benefits and Orphan's Benefits.
10. Cancel driver's license, health card, SIN number, condo maintenance fees, mortgage payments, magazine and newspaper subscriptions, cable, club memberships, telephone and request refunds if appropriate.
11. Confirm outstanding balances and cancel credit cards.
12. Request Canada post to re-route mail.
13. Ascertain assets and liabilities by writing to financial institutions, insurance companies, brokers, employer, RRSP/RRIF trustees.
14. Obtain prior years tax returns. Prepare and file T1 returns for the previous years within 6 months of the date of death or April of that year, whichever is sooner.
15. Locate and obtain title documents for real property, mortgages, share certificates, bonds, debentures and guaranteed investment certificates.
16. Arrange valuations of real estate, securities, personal property, and automobiles.
17. Arrange for a review of the investment portfolio.
18. Send a copy of the Will to each residuary beneficiary.
19. Notify legatees/devisees of benefit to be received under the will.
20. Notify charities of the charitable bequests (and regulators where required).
21. Open estate bank account (if required).
22. Notify dividend and bond disbursing agents to change address or record.
23. Prepare inventory of assets and liabilities. List assets by class, value, full particulars, maturity date, interest rate, payment frequency and dates.
24. Obtain and meet with estate solicitor to complete application for probate. Make provisions for any fees that may be applicable.
25. Schedule an appointment with the Pre Arranging Director to pre-arrange funeral details, providing guidelines for their survivors or, alternatively, making arrangements for someone in their care.

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IMPORTANT TELEPHONE NUMBERS

Major Banks:

CIBC 1-800-465-2422
BMO 1-800-555-3000
Royal Bank of Canada 1-800-769-2511
TD Canada Trust 1-866-222-3456
ING Direct 1-888-464-0727
Scotia Bank 1-800-472-6842
PC Financial 1-888-872-4724

Major Department Stores:

Sears 1-800-265-3675 ext. 5159
The Bay 1-800-387-4540
Zellers 1-800-387-4540
Canadian Tire 1-800-263-0471
Ikea 1-800-233-8557
Home Depot 1-800-747-3787
Walmart 1-866-685-5690

Visa:

C.I.B.C 1-800-256-8580 ext. 6092
Laurentian Bank of Canada 1-800-522-1846
Royal Bank 1-800-769-2512
Scotia Bank 1-800-387-6556
Canada Trust 1-866-672-1353
PC Financial 1-888-872-4724

Gas Cards:

Esso (Imperial Oil) 1-800-567-3776
Petro Canada 1-800-668-0220
Shell 1-800-263-2263 (Visions)
Sunoco 1-888-622-2283

MasterCard:

Bank of Montreal 1-800-263-2263
Customer Care for Mastercard 1-800-265-9710
Hepco Credit Union 1-800-268-8023

Utilities:

Union Gas 519-344-3676
Bluewater Power 519-337-8201
Cogeco 519-336-6200
Bell Canada - phone 1-800-668-6878
Bell Canada - internet 1-800-773-2121
Bell Canada - wireless 1-800-667-0123
Bell Canada - satellite 1-888-759-3474

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Driver's License:

You do not need to call anyone. Simply mail in the actual driver's license, a Proof of Death Certificate and a cover letter to:

Ministry of Transportation
Licensing and Control Branch
PO Box 9100
Kingston, Ontario
K7L 5K3

Social Insurance Number:

You do not need to call anyone. You may go in person to a local Human Resources Development Canada office or simply mail in the actual card (or just the number), a Proof of Death Certificate and a cover letter to:

Social Insurance Registration
PO Box 7000
Bathurst, New Brunswick
E2A 4T1

Health Card (OHIP):

Ministry of Health 1-800-268-1154
Mail a proof of death certificate along with the health card (if there is one) to this address:

Ministry of Health
PO Box 1700
Station A
Toronto, Ontario
M5W 1G9

Newspapers:

Sarnia Observer 519-344-3641
London Free Press 1-800-265-4100
Windsor Star 1-800-265-5647
Osprey Sun Media 1-866-541-6757

Other:

American Express 1-800-387-9700
Platinum Card 1-800-263-1616
ETR 1-888-407-0407
CAA 519-344-8686
Air Miles 1-888-247-6453
HBC 1-800-844-8131
Optimum 1-800-746-7737

Smith FUNERAL HOME

& Family Centre

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To:

From:

Date:

Reference No. (s):

I wish to inform you of the death of

(full name)

my

on

(relationship)

(date)

Please:

Other:

If you require any additional information or documentation to fulfill the request(s) set forth above, please provide detailed and clear instruction in your correspondence to me.

Thank you for your prompt assistance during this difficult time.

Sincerely,

(signature)

(print name clearly)

Enclosure(s)

