

Cadence

Settling an Estate - What You May Need (Canada)

Settling an estate starts with locating important documents, assets, property and information about the deceased. Try to track down as many of these items as possible (as applicable):

Legal

- Funeral Director Statement of Death or Death Certificate
- Last Will and Testament
- Beneficiary contact info
- Marriage license
- Divorce/separation papers
- Pre/postnuptial agreements
- Trust agreements
- List of assets

Government

- Social Insurance Number
- Driver's license
- Health card
- Birth certificate
- Status card
- Metis/Inuit membership
- Passport
- Permanent resident card
- Immigration/citizenship documents
- Firearm license

Home/Property

- Vehicle registration
- Lease or rental agreements
- Landlord/tenant Info
- Deeds and titles
- Mineral rights
- Property income statements
- Timeshare agreements

Utilities/Telecom

- Security
- Gas/hydro
- Electricity
- Phone/internet
- Cable/Satellite

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Insurance

- Life insurance policy
- Home insurance policy
- Vehicle insurance policy
- Annuity statement

Business

- Incorporation documents
- Business license
- Shareholder agreements
- Buy/sell agreements

Employment/Pensions

- Employment contracts
- Pension/benefit statements
- Social assistance records
- Military service records
- Employment insurance records
- Professional/Union memberships

Banking

- Safety deposit box
- Statements, agreements
- Debit card, cheques, bank books
- Mortgage information
- Credit card statements
- Lines of credit/loans

Investments

- Investment portfolio
- RRSP/RRIF/RESP
- Stocks, bonds and investment certificates
- Annuities
- Crypto wallet

Memberships/Accounts

- Accounts held
- Passwords/account numbers

Taxes

- Tax returns/assessments
- Property tax bills
- Tax shelter documents