



## Settling an Estate - What You May Need

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

### 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

### 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

### Insurance

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

### Business

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

### Taxes

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

### 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

Disclaimer: This document has been prepared for general informational purposes only and may not apply to every situation. It does not constitute legal or accounting advice.



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