

THE EXECUTOR'S

Guide

for the Estate of

Date Completed

Name

Using this Guide

There are important documents that must be located, benefits to be applied for and paperwork to be completed to settle an estate.

It is in your best interest that you take the time to address these important issues soon after the funeral, rather than put them off to a later date.

This Executor's Guide is designed to help you complete some of these tasks that you may be unfamiliar with.

Life will be confusing enough for a while without trying to remember who you talked to or what was said.

It is our hope that this Guide will help simplify matters for you as you handle these important details.

Additional copies of this Guide are available without charge at

The Lakefield Cemetery & Crematorium Office
1262 Buckhorn Road - Lakefield, Ontario K0L 2H0

or our website at <http://www.lakefieldcemetery.com>

You can contact us by

Phone: (705) 652-3252

Weekdays 9:00 am - 5:00 pm

Email: lakefield.cemetery@on.aibn.com

The Executor's Guide

Check off each item as it is completed

Every time you make a phone call or receive correspondence, use the worksheets to record dates, names, and pertinent information, that way there will be no doubt for you - or anyone else - that an item was not overlooked.

Record Information

You will find that submitting a claim or updating an account is less complicated if you don't have to go looking for phone numbers and contact information.

Assemble

As you make phone calls and receive correspondence, this guide will be a handy place for keeping your information in order and in one place.

Canada Pension Plan

1-800-277-9914

The following needs to be completed:

- ☐ Inform Canada Pension of your loss. Complete the survivor's benefit form
- ☐ Apply for monthly and one-time lump-sum payments.
- ☐ Information needed includes:
 - Proof of death - either from the funeral home or a Death Certificate
 - Survivor's birth or baptismal Certificate
 - Marriage Certificate if survivor is a widow or widower
 - A Statutory Declaration if you were living in a common-law relationship.
- ☐ Set a phone appointment to verify your new adjusted income if possible.

Date of Phone Appointment _____ Time: _____

Veteran's Benefits

1-800-267-0325

- ☐ Notify Veteran's Affairs Office to apply for eligible benefits.

If currently collecting benefits Veteran's Affairs will already have your information file.

- ☐ Last Post Fund Contacted

Note:

You can contact last Post Fund up to one year after the death for assistance at 1-800-563-2508

Ministry of Health

1-800-268-1153

- ☐ Notify the Ministry of Health of your loss
- ☐ Send out OHIP card and proof of death to P.O. Box 48. Kingston, ON K7L 5J3

Pensions / Retirement Funds Union / Non Union

We will:

Phone: _____

- ☐ Contact the employer (Personnel Dept.)
- ☐ Inquire about qualifications for continuation of income, life and health benefits:

Life Insurance / Beneficiary Changes

- ☐ Name of Company and Phone Number

- ☐ Notify Company of Death
- ☐ Request Claim Forms
- ☐ Request change of beneficiary form for survivor's policy
- ☐ Credit Life insurance
(*Reducing term insurance for the duration of loan*)
- ☐ Home
- ☐ Auto
- ☐ Credit Cards
- ☐ Other

Bank Accounts

Interest Bearing Accounts:

- ☐ Notify the institution of death, because of possible tax filing changes.

Chequing Accounts:

- ☐ No changes necessary for joint chequing accounts.

If the deceased was the sole account holder, all unused cheques should be destroyed.

Credit Cards

Two Options:

- ☐ Cancel the account.

Destroy all credit cards.
(Ask for written confirmation of cancellation)

- ☐ Leave account open
(Provided the survivor is an authorized user)

Real Estate Title Transfer

- ☐ Notify Real Estate Lawyer
- ☐ Transfer of title into survivor's name
- ☐ Affidavit of survivorship

Automobile Title Transfer

- ☐ Contact department of motor vehicle title and registration
- ☐ If auto is titled jointly, in order to remove the name from the title, a copy of the Death Certificate is required.

Note:

You will need to have the vehicle identification numbers and drivers licence at hand.

Pay Miscellaneous Disbursement Items

- ☐ Newspaper Notice
- ☐ Flowers
- ☐ Clergy honorarium
- ☐ Organist honorarium
- ☐ Soloist honorarium
- ☐ Police Escort to cemetery
- ☐ Reception Costs
- ☐ Cemetery fees

☐ _____

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