

National Executor Assistance Program



Beechwood Cemetery
proudly serving our community
since 1873



The Checklist

The following steps are often taken after a death occurs. The purpose of this list is to draw attention to some of the details you will need to address. It is not intended to be thorough and complete. You are encouraged to obtain advice from a lawyer before you file any documents in court.



IMMEDIATE DUTIES

- Locate preneed funeral or cemetery prearrangement (if they exist).
- Locate the will if there is one (check safety deposit box, law firms, personal effects).
- Determine whether there are any special funeral directions.
- Notify relatives, friends, others of death.
- Speak with the family if deceased did not leave instructions for either cremation or burial.
- Make funeral arrangements.
- Review the deceased's financial affairs.
- Arrange appointment with Coroner or Funeral Home (to obtain personal effects and information on death if applicable).
- Arrange for copies of Proof of Death Certificate from your Funeral Director.

PROTECT THE ESTATE

- Ensure safe custody of personal valuables.
- Locate, identify and inventory assets.
- Secure and protect important documents such as: property titles, mortgages, insurance policies, banking and investment documents (may include share certificates, bonds, debentures, guaranteed investment certificates), personal income tax returns, pension plan information, Social Insurance Number.
NOTE: where a beneficiary of insurance, pensions, etc. has been named, these items are not considered estate assets. Speak to a lawyer about such matters.
- Contact utility services to ensure services continue in order to protect the value of property.
- Confirm identity and current addresses of beneficiaries including common-law spouse, children or separated spouse.
- Redirect mail at post office (register change of address).
- Notify Land Titles Office of death if titled property (real estate) is involved.
- Notify Public Guardian and Trustee of any minor children or dependent adults.



CANCELLATIONS/CHANGES

You may likely need copies of the funeral director's Proof of Death Certificate to notify these offices, arrange for bill payment from the estate, cancel the account or change the name of the account holder:

- Credit bureau - to assist in determining outstanding debts
- Credit cards - banks, department stores and others
NOTE: outstanding balances on credit cards, bank credit lines, loans and mortgages may be covered by insurance. Before you pay any outstanding amount, check to see if it is life insured.
- Cable/satellite TV
- Driver's licence
- Electric/utilities
- Health insurance coverage - provincial, territorial, extended health packages
- Internet/email
- Life insurance
- Memberships - associations, clubs
- Rental/lease agreements
- Subscriptions - newspapers, magazines
- Telephone
- Vehicle registration

VALUE THE ESTATE

Contact the following to determine assets and liabilities at the date of death, and what documentation is required to finalize:

- Financial institutions - banks, credit unions
- Brokers - stock brokers, mortgage brokers
- Investment advisers and companies holding investments
- Insurance companies
- Business partners
- Employer
- RRSP/RRIF trustees
- Advertise for creditors



GOVERNMENT OFFICES/PROGRAMS

see also Service Canada web site for assistance

- Canada Pension Plan – to apply for death/survivors' allowances and benefits
- Canada Revenue Agency – preparation of tax returns and Certificate of Clearance
- Child Tax Credit – if children are involved
- Citizenship and Immigration Canada - to cancel Canadian citizenship card
- First Nation – re entitlements or claims under Self-Government Agreement INAC/DIAND
- Old Age Security Pension
- Social Insurance Number
- Passport Canada – to cancel a Canadian passport
- Federal Pensions - employee, military



OTHER

- Associations, unions, societies
- Church/synagogue/temple/spiritual centres
- Clubs
- Contractors
- Dentist, doctor, chiropractor, other health practitioners
- Hospital – to obtain personal effects, information
- Lawyer
- Library
- Pensions (other) – may be non-government employer or from another country
- Pets licences
- Schools/colleges/universities/institutes



The Solution

As the National Cemetery of Canada, we understand the importance of being an executor. We sincerely hope this Beechwood National Executor Assistance Program will serve as a friendly roadmap for many of the tasks that as an executor you will be called upon to complete.



To help you feel confident in your role, Beechwood offers to personalize many of the documents and Government forms which must be completed.

Beechwood can provide valuable assistance for many of the tasks that executors and survivors must deal with when settling an estate.

The Beechwood National Executor Assistance Personalized Program prepares all the enclosed notifications, letters and Government forms included in this NEAP package.

We know this time in your life is hard enough without needing the extra burden, both emotional or financial, of being the executor. Purchase the full personalized kit today:

 **PURCHASE TODAY >**



also included **A SPECIAL GIFT FROM BEECHWOOD TO YOU**

This gift was specifically created as a thank you to the 1000's of dedicated men and women throughout Canada who have accepted the role of being an executor. We would like to provide you with the Beechwood Personal Memory Book designed to help you share memories and make your final wishes known to your loved ones. We all know that pre-planning your funeral and cemetery wishes not only eases the burden on your family, it allows them to cherish what is most important... Your love for them and the lifetime of memories you wish to share. We hope you find value in this small token of our appreciation.





Contact us

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*Owned by The Beechwood Cemetery Foundation
and operated by The Beechwood Cemetery Company.*

About us

For over 150 years, Beechwood, Canada's National Cemetery has continued to serve as the National Military Cemetery of the Canadian Forces, National RCMP Memorial Cemetery, the CSIS Cemetery and serves as the final resting place for many more organizations and religious groups. Beechwood has been proudly serving our community since 1873.

Beechwood, Funeral, Cemetery and Cremation Services is owned by The Beechwood Cemetery Foundation and operates on a not-for-profit basis. Governed by a volunteer Board of Directors, all revenues and donations go towards the preservation and enhancement of this National Historic Site. The Beechwood Cemetery Foundation was originally created for the purpose of safeguarding Canada's National historic past, as well as the important historical persons buried within it and towards continued national public awareness of Canada's Legacy.

IMPORTANT!

This guide has been produced by Beechwood Cemetery Company. The information contained within this package should not be considered as a substitute for the advice of any pertinent specialist, such as a lawyer, accountant or financial advisor. We trust this information will be of help to you in the days, weeks and months ahead.

The information provided in this guide is believed to be correct as of its date of publication.

