

Executor Duties Checklist

Facing the duties of an executor of a will can be overwhelming. We have put together a list to help. The summary below is not intended to be all-encompassing and does not cover any further duties that may be involved should complications arise with the estate but it will give you a good foundation of the basics. Oliver's Funeral Home encourages you to consider the advice and counsel of an attorney.

If you require further assistance or have questions please give us a call at **780.532.2929** or e-mail at info@oliversfuneralhome.com. We will help guide executors of wills through the process, professionally and patiently.

Duties of an Executor

- Locate and review will
- Deal with intentions as to donation of organs, cremation or burial
- Contact and/or retain lawyer for advice and assistance
- Contact life insurance company to help cover immediate expenses
- Give notice to beneficiaries regarding the contents of the will.
- Locate and protect assets
- Protect business interests
- Collect valuables
- Open estate bank account
- Ensure all property is insured
- Assemble and value assets (e.g., real property, furniture, bank accounts, securities, business interests, jewelry)
- View safety deposit box to determine contents
- Determine if there are any agreements that apply to the assets (e.g., buy-sell agreement, Shareholders Agreement)
- Determine if there is property located out of the province
- Apply for Canadian Pension Plan Benefits
- Notify Blue Cross and Alberta Health Care
- Order death certificates if required
- Cancel credit cards; obtain final statements
- Redirect mail
- Cancel subscriptions, memberships, etc.
- Arrange for the transfer of jointly held assets

- Assist lawyer in preparation of documents to apply for a Grant of Probate
- Contact lawyer and Public Trustee if minors are involved
- Determine with lawyer applicability of legislation (e.g., Family Relief Act, Matrimonial Property Act)
- Advertise for creditors
- File tax returns; obtain clearance certificate
- Pay taxes, debts, funeral expenses, etc.
- Prepare an accounting of the administration of the estate
- Determine if any matrimonial agreement might affect the distribution of the assets
- Defend or commence lawsuits as necessary
- Convert assets to cash where appropriate
- Determine your fee and obtain approval from the beneficiaries or by court order
- Prepare and have all beneficiaries sign a release
 - Distribute the assets of the estate

Note: Funeral expenses do not have to go to probate (most banks will pay the account(s) from the deceased's bank account).

If you require further assistance or have questions please call to speak with Oliver's After Care Counsellor at **780.532.2929** or e-mail at info@oliversfuneralhome.com

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