

***CHECKLIST FOR A DECEASED TAXPAYER***

LAST NAME: \_\_\_\_\_

FIRST NAME: \_\_\_\_\_

SIN: \_\_\_\_\_

DATE OF BIRTH (mm/dd/yy): \_\_\_\_\_

DATE OF DEATH (mm/dd/yy): \_\_\_\_\_

EXECUTOR/TRIX (list all): \_\_\_\_\_

Has anyone declined this role? YES NO

**If yes**, please provide a copy of the legal document that cancelled their appointment.

Was the deceased a Canadian citizen? YES NO

Was the deceased a U.S. Citizen, Green Card Holder, born in the U.S. or considered a U.S. person? YES NO

**If yes**, have you determined the U.S. filing requirements? YES NO

Address for returns:

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Phone number(s) for executor/trix: \_\_\_\_\_

Phone number, name, and relationship to the deceased for contact (if not executor/trix)

Name \_\_\_\_\_

Phone Number: \_\_\_\_\_

Relationship: \_\_\_\_\_

Province of residence at death: \_\_\_\_\_

What was their marital status at death? Please check.

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Married

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Separated

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Living common-law

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Divorced

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Single

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Widowed

Was there a change in marital status during the year? YES NO

**If yes**, what was the change and on what date: \_\_\_\_\_

Provide the name and address of the lawyer who is working on the estate:

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Provide a full list of all assets and values at the date of death that were owned at death:  
Don't forget to include RRSPs, TFSAs, RIFs, Bank accounts, House, Vacation properties, Land, Stocks or bonds, Household items (one value is fine), Vehicles, Business assets. In the description, include all details including original cost of capital items and beneficiary in the will.

Type	Description, Original cost	Fair Market Value	Beneficiary
<i>Example: House</i>	<i>Purchased: 2014, \$350,000 123 Avenue, Sundre</i>	<i>\$400,000</i>	<i>Son, Peter</i>

Did the individual have a principal residence or other real estate at date of death?

YES      NO      **If yes**, please fill in the **Real Estate Checklist**.

Does the estate have any **debts**?    YES      NO

**If yes**, list them:

Type	Description	Value at date of death:
<i>(Example: Credit card</i>	<i>BMO MasterCard</i>	<i>\$1,000.00)</i>

