Valerie L. Burrell Professional Corporation Chartered Professional Accountant

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:
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. Married Living common-law Divorced Single Widowed
Was there a change in marital status during the year? YES NO
If yes, what was the change and on what date:

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Provide the nam	ne and address of the lawyer who is	s working on the	e estate:	
Don't forget to properties, Land Business assets.	st of all assets and values at the dat include RRSPs, TFSAs, RIFs, Ban I, Stocks or bonds, Household item In the description, include all deta iciary in the will.	k accounts, Houns (one value is	ise, Vaca fine), Ve	ntion hicles,
Type	Description, Original cost	Fair Market	Value	Beneficiary
Example: House	Purchased: 2014, \$350,000 123 Avenue, Sundre	\$400,000	\$400,000	
Did the individu YES NO	al have a principal residence or oth If yes, please fill in the Re			death?
Does the estate If yes, list them:	have any debts ? YES NO:			
Type	Description		Value at	date of death:
(Example: (Credit card	(Example: RMO MasterCard		\$1,000.0	

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Were there any amounts **owing to** the estate at the date of death? (ie. Additional pension payout, vacation pay, death benefit, life insurance payable to the estate, dividends, cash farm inventory sales)

VEC	NTO
YES	NO

If yes, list them:

Type	Description			Value		
Did the estate receive the CPP death benefit? YES NO If yes, on what date and who was the beneficiary?						
Date (mm/dd/yy):						
Beneficiary:						
How much was the CPP death benefit for?						
Did the deceased have any Foreign Property? YES NO If yes, please provide details.						

Please provide a copy of:

- 1. The death certificate
- 2. The will if there is no will, provide a copy of the application to the courts to appoint a trustee
- 3. The last three income tax returns (if not prepared in our office) and last Notice of Assessment