

# Deceased Person CHECKLIST

## BASIC INFORMATION

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- Full legal name of deceased
- SIN (Social Insurance Number)
- Date of birth
- Date of death
- Marital status at death
- Last residential address
- Copy of the **death certificate**
- Province of residence at death

## PRIOR TAX INFORMATION

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- Copies of the last **2-3 years of T1 returns** (if we do not prepare them)
- CRA Notices of Assessment/Reassessment
- CRA My Account access (if available)

## ASSETS AT DATE OF DEATH

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Provide **FMV on date of death** for:

- Non-registered investment accounts
- Real estate (principal residence + other properties)
- Cottage or vacation property
- Shares in private corporations
- Business assets
- Cryptocurrencies
- Foreign property (note cost base & FMV)
- Adjusted cost base (ACB), if known
- Purchase dates and prices

## ESTATE ACTIVITY AFTER DEATH (T3 RETURN)

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- Estate bank account statements
- Investment income earned after death
- Expenses paid by the estate
- Distributions to beneficiaries (dates and amounts)

## YOUR ROLE

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- Are you the **executor/estate trustee**?
- Copy of the **will**
- Probate status (applied/granted/not required)
- Listing of assets submitted for probate purposes
- Address for CRA mailing purposes
- Phone number/email to contact you at

## INCOME FROM JAN 1 TO DATE OF DEATH (FINAL T1)

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- T3 Investment Income
- T4/T4A -Employment Income or Commission Income
- T4A-P/T4A-OAS Canada Pension/Old Age Security Pension
- T4A-CERB/T4A-CRB Canada Emergency Response/Canada Response Benefit
- T4E Employment Insurance Income
- T4RIF Registered Income Fund Withdrawals
- T4RSP RRSP Withdrawals
- T5 Dividend and Interest Income
- T5007 Workers' Compensation Benefits
- T5008 Statement of Securities Transactions including gain/loss summary report from your financial institution
- T5013 Limited Partnership Income
- Rental Income/Expenses (form T776 on [ctt-cpa.ca](http://ctt-cpa.ca))
- Self-employed (small business) income (worksheet on [ctt-cpa.ca](http://ctt-cpa.ca))
- Foreign Income including pension income from other countries