

## PERSONAL REPRESENTATIVE/EXECUTOR DUTIES

1. *Locate will and read it.*
2. *Ensure that funeral arrangements are complete.*
3. *Meet with a solicitor and attend to immediate needs.*
4. *Compile a complete inventory of estate assets and debts.*
5. *Protect estate by making sure property is in safekeeping and properly insured.*
6. *Protect and preserve any active business interests.*
7. *Pay any debts and make arrangements for payment of any ongoing debts such as mortgages or loans.*
8. *Obtain particulars of estate assets such as balances in bank accounts and value of personal property.*
9. *Apply for insurance proceeds, employee benefits and pension pay-outs from government and private pensions.*
10. *Locate witnesses to will and obtain affidavit of execution of will.*
11. *Advertise for creditors and claimants where necessary.*
12. *Settle any claims made against the estate.*
13. *Complete the application for probate and submit to the court.*

14. Complete and submit all the necessary paperwork for each asset to have it transferred to the surviving beneficiary.
15. Complete and submit all the necessary paperwork to have any joint assets transferred to the surviving party.
16. Invest and manage the estate until it is finally disbursed.
17. Deliver personal property and other specific gifts to the appropriate beneficiary.
18. Collect all debts, monies or property owing to or belonging to the estate.
19. Arrange for sale of any assets that need to be disposed.
20. Distribute residue of the estate to the beneficiaries and obtain releases from all the beneficiaries.
21. Manage any trust. This includes the necessary bookkeeping, income and capital payments, investment decisions, accounting to the court and filing of tax returns.
22. Prepare and submit all the necessary tax returns.
23. Obtain a tax clearance certificate from the Canada Revenue Agency.

Your lawyer, accountant and corporate or professional trustee can assist you with many of these duties. This is only a summary of the potential duties and some may not apply to your situation, while additional duties not set out above may also exist.