Estate Information Form

This form is for clients who have already retained Christopher Taskey. If you're not yet a client, please don't fill this in. Please send a message through the contact page instead.

Fill in what you know. It is fine to leave answers blank. Christopher's office will tell you how to complete and return it.

Please do not write Social Insurance numbers or bank or credit card account numbers on this form. The office will ask for anything like that in person or by phone.

Draft for review. Not yet approved by Christopher Taskey.

Your file number, if you have it
Letters, numbers, spaces and / . - only. Leave blank if you don't know it.

About you (the person filling this in)

Your name

Your phone number

Your email address

Your relationship to the person who died
For example: executor, son, daughter, friend.

The person who died

Full name of the person who died

Maiden name (if applicable)

Date and place of death

Street address or Legal Description at the time of death

Date and place of birth

Where they lived during the 6 months before death

Spouse or partner

Did they marry after the date of the will?

- ○ Yes
- ○ No
- ○ Not sure

If yes, the date of that marriage

Marital status at the time of death

- ○ Married
- ○ Common law
- ○ Adult interdependent partner
- ○ Single
- ○ Divorced
- ○ Widow / widower

Name of a spouse who died earlier, or a divorced spouse (if applicable)

That spouse's date of death

Date of divorce

Full name of the surviving spouse or partner (if applicable)

Surviving spouse or partner: street address or Legal Description, and mailing address (PO Box or R.R.)

Personal representative (executor) 1

Executor 1: name

Executor 1: is the name spelled correctly in the will?

- ○ Yes
- ○ No
- ○ Not sure

Executor 1: street address or Legal Description, and mailing address (PO Box or R.R.)

Executor 1: email address

Executor 1: home phone

Executor 1: business phone

Executor 1: claiming executor fees?

- ○ Yes
- ○ No
- ○ Not sure

Personal representative (executor) 2, if there is one

Executor 2: name

Executor 2: is the name spelled correctly in the will?

- ○ Yes
- ○ No
- ○ Not sure

Executor 2: street address or Legal Description, and mailing address (PO Box or R.R.)

Executor 2: email address

Executor 2: home phone

Executor 2: business phone

Executor 2: claiming executor fees?

- ○ Yes
- ○ No
- ○ Not sure

Children

Children: full legal name, address and date of birth (one child per line)

Date of death of any of the children above

Any of the children above who have a physical or mental disability

Children of any children who have died (grandchildren)

Beneficiaries

Beneficiaries: full legal name, mailing address, email address and date of birth (one per line)

The will

Where the will has been kept since it was signed

Witnesses to the will

Witnesses to any codicil (a later change to the will)

Safety deposit box: where it is

Property (inventory)

Approximate values are fine.

Real estate: for each property, the municipal address, the Legal Description (Plan / Block / Lot, or Section / Township / Range / Meridian) and the approximate value

Mortgages or other encumbrances on the real estate

Mines and minerals

Debts owed to the person who died

Cash: bank or credit union, type of account and approximate value (one per line)

Please don't include account numbers.

Shares

Bonds

Annuities, RRSPs, RRIFs and TFSAs payable to the estate

Pensions payable to the estate

Canada Pension Plan death benefit

Interest in other estates or trusts

Personal effects

Vehicles

Business interests

Farming interests (cattle, grain, machinery)

Other property

Debts of the estate

Type of account and balance owing. Please don't include account numbers.

Credit cards

Vehicle financing

Other debts

Tax and other

Who is filing the tax returns (the final return and any CPP survivor’s return)?

Year the last income tax return was filed

Do the executor(s) need a clearance certificate?

- ○ Yes
- ○ No
- ○ Not sure

Accountant

Do the executor(s) wish to advertise for creditors?

- ○ Yes
- ○ No
- ○ Not sure

Thank you. Christopher’s office will tell you how to complete and return it.