

Ontario Estate Information Checklist for Executors

This checklist is intended to help an Ontario testator organize information to assist their Estate Trustee(s) or Attorneys for Property or Personal Care with administering their estate or managing their assets. It should be reviewed regularly and kept in a secure location. This document does not form part of the Will.

1. Personal Information

Full legal name (including prior or maiden names): _____

Date and place of birth: _____

Social Insurance Number (SIN): _____

Citizenship(s): _____

Primary residence address: _____

Birth certificate located at: _____

Marriage/divorce certificates located at: _____

2. Will & Estate Planning Documents

Original Will located at: _____

Date of most recent Will: _____

Estate Trustee(s) name and contact information: _____

Alternate Estate Trustee(s) and contact information: _____

Power of Attorney for Property located at: _____

Attorney(s) for Property name and contact information: _____

Alternate Attorney(s) for Property name and contact information: _____

Power of Attorney for Personal Care located at: _____

Attorney(s) for Personal Care name and contact information: _____

Alternate Attorney(s) for Personal Care name and contact information: _____

Trust agreements (if any): _____

3. Key Contacts

Lawyer: _____

Accountant: _____

Financial advisor: _____

Insurance advisor: _____

Primary bank/branch contact: _____

Family doctor: _____

Other medical specialists: _____

4. Funeral & Burial Instructions

Burial Cremation Other: _____

Funeral home preference: _____

Cemetery/columbarium: _____

Pre-paid arrangements (details): _____

Organ and tissue donation consent? _____

5. Real Estate (Ontario & Other)

Property address: _____

- Ownership type: Sole Joint Tenancy Tenants-in-Common
- Mortgage lender/mortgage account number: _____
- Property tax account: _____
- Land Titles system Registry system
- Insurance information: _____

Secondary Property address: _____

- Ownership type: Sole Joint Tenancy Tenants-in-Common
- Mortgage lender/mortgage account number: _____
- Property tax account: _____
- Land Titles system Registry system
- Insurance information: _____

6. Financial Accounts & Investments

Bank accounts (details attached): _____

RRSP/RRIF TFSA Non-registered investments

Institutions/account numbers: _____

Have beneficiaries been designated on your registered accounts? (provide details) _____

7. Insurance & Pension Benefits

Life insurance policy/policies

- Insurer and policy number(s): _____
- Beneficiary designations?: Yes No
- Provide beneficiary details: _____

Receiving or entitled to workplace pension benefits?

- Provider and plan number(s): _____
- Death benefits associated with this plan?: Yes No

• Provide beneficiary details: _____

Receiving government benefits, such as ODSP, CPP-D, Ontario Works?

• Caseworker's information, if any: _____

• Details of benefits: _____

8. Business Interests

Corporation Partnership Sole proprietorship

Business name(s): _____

Shareholder or partnership agreement in place? Yes No

If yes, where can the agreement be found? _____

9. Digital and Other Assets

Email accounts: _____

Online banking/investment/trading accounts: _____

Cryptocurrency: _____

How to access cryptocurrency wallet? _____

Social media accounts: _____

Password manager or access instructions located at: _____

Reward points: _____

10. Personal Effects

Vehicle(s): _____

• Particulars of insurance: _____

• Location of vehicle(s): _____

Boats and/or recreational vehicles: _____

• Particulars of insurance: _____

• Location(s): _____

Valuable personal items, and their location: _____

Artwork: _____

• Location of artwork: _____

• Any contact person re: art? _____

Firearms: _____

• Location and how stored?: _____

Collectibles: _____

• Location of collectibles: _____

• Any contact person re: collectibles? _____

Copyrighted materials: _____

• Receiving royalties? Yes No If yes, who collects and distributes? _____

• Who controls the rights to the materials? _____

10. Liabilities

Mortgages: _____

Lines of credit: _____

Credit cards: _____

Other liabilities: _____

11. Family & Special Considerations

Minor children: _____

Adult children: _____

Spouse(s): _____

Support obligations: _____

Pets and care arrangements: _____

12. Other Relevant Information: