Probate Intake Checklist

1 Trustee(s) ("Executor") Information

- ☐ Name(s) for each Trustee
- ☐ Addresses(s) for each Trustee
- ☐ Telephone Numbers for each Trustee
- ☐ Email for each Trustee
- ☐ Relationship to the Deceased for each Trustee
- ☐ Occupation of each Trustee
- ☐ Does any Trustee have a conflict of interest? Some examples of a conflict of interest include:
  - A Trustee prefers an election under the *Family Law Act* instead of receiving under the Will.
  - A Trustee wants to make a Dependant's Support claim under the *Succession Law Reform Act*.
  - A Trustee objects to a portion of the will or wants to challenge the Will.

2 Information about the Deceased

- ☐ Name
- ☐ Date of Birth
- ☐ Date of Death
- ☐ Place of Death
- ☐ Last address of the Deceased
- ☐ Social Insurance Number
- ☐ Last Occupation
- ☐ Name of Funeral Home
- ☐ Address of Funeral Home

3 Information about the Deceased's Will and other Estate Documents

Yes	No	
☐	☐	Did the Deceased have a Will? If yes, please provide the original.
☐	☐	If any Codicils, please provide original with Affidavit of Execution.
☐	☐	Is there an Affidavit of Execution for the Will? If yes, please provide the original.
☐	☐	Did the Deceased have existing Trust(s)? If yes, provide a copy.
☐		Proof of Death (e.g. funeral director's statement of death or Death Certificate)

4 Information about the Beneficiaries

- ☐ Names of each Beneficiary
- ☐ Addresses of each Beneficiary

5 Information about the Deceased's Family

5.1 Spousal Information

Yes	No	
☐	☐	Was the Deceased married?
☐	☐	Was the Deceased divorced or separated?
☐	☐	Did the Deceased have a pre-deceased spouse?
☐	☐	Was the Deceased living in a conjugal relationship at death?
☐	☐	Does the deceased have a living spouse?

If you answered yes to any of the above, please provide the necessary information for each spouse:

- ☐ Name
- ☐ Divorce date
- ☐ Date of separation
- ☐ Date of death of a predeceased spouse
- ☐ Proof of Death
- ☐ Marriage Contract
- ☐ Cohabitation Agreement
- ☐ Divorce Order
- ☐ Separation Agreement
- ☐ Court Order

5.2 Children and Grandchildren Information

Yes	No	
☐	☐	Does the Deceased have any living children?
☐	☐	Does the Deceased have any children that predeceased?
☐	☐	Is any child under the age of 18?
☐	☐	Does the Deceased have any living grandchildren?
☐	☐	Does the Deceased have any grandchildren that predeceased?
☐	☐	Is any grandchild under the age of 18?

If you answered yes to any of the above, please provide the necessary information for each child and grandchild.

- ☐ Name
- ☐ Date of Birth
- ☐ Date of Death
- ☐ Address
- ☐ Name of each parent

6 Assets of the Deceased

- ☐ All values are to be as of the date of death of the Deceased.
- ☐ Value of Personal Property: $______________________
- ☐ Value of Real Estate net of encumbrances: $_________________________
- ☐ Do not include values for:
  - Jointly owned assets with a right of survivorship
  - RRSPs, RRIFs, TFSAs with a named beneficiary
  - Insurance proceeds paid to a named beneficiary
  - Real estate owned outside of Ontario
  - Gifts made during the Deceased’s lifetime
  - Assets in a trust created during the Deceased’s lifetime

7 Helpful Hints

- ☐ If you are going to be acting as the Estate Trustee, purchase a journal so that you can record all of the financial transactions and time spent in administering this estate. You may be required to account for your financial management of the estate at the end of your administration. You may also have to account for your time in support of any Executor's Compensation that may be claimed by you.
- ☐ Prior to meeting with the lawyer, write down a list of questions that you want to ask the lawyer. There is often a lot of information to take in when meeting with a lawyer. Having a list of questions ensures that you do not forget the questions you want to ask.
- ☐ Download the Executor's Checklist from the Executor's Checklist Tab to help keep you organized throughout the administration process.