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ESTATE INCOME TAX SUPPLEMENTARY CHECKLIST

- This is a supplement to my regular personal income tax checklist with the extra information required for deceased taxpayers. The regular personal income tax checklist should also be reviewed.
- Completion of this checklist is required before work can begin.
- Please bring any missing information or unusual matters to my attention. Perhaps I can find a way to save you time or money with this.

EXECUTOR INFORMATION

Name of executor: ____

Telephone number: ______________________________ E-mail: ____________________________________

Address: ____

TAXPAYER INFORMATION

Name of deceased taxpayer____

- ☐ Copy of will
- ☐ Date of death: _______________________________
- ☐ Copy of prior year T1 Personal Income Tax Return (if a new client)
- ☐ Has CRA been notified of the death? Y / N
- ☐ Have you provided a copy of the will to CRA yet? Y / N
- ☐ Have you notified the taxpayer’s bank and investment advisors of the death? Y / N
- ☐ List of real estate market value and cost owned as of the date of death
- ☐ Obtain and attach a schedule of unrealized gain/loss for investments as of the date of death from investment firm); not required for RRSP/RRIF/TFSA/Pension accounts.
- ☐ Investment statements, bank statements, and trust account statements from January 1 of the year of death to present; not required for RRSP/RRIF/TFSA/Pension accounts.
- ☐ Copy of probate inventory and other probate schedules (if applicable)
- ☐ If probate was not done, then also provide a list of the market value of RRSP, RRIF, TFSA, and Pension accounts as of the date of death