

Estate Discovery List

You must attempt to locate all essential materials, including:

Government

- SIN card
- Driver's license
- Passport
- Health card
- Status card
- Permanent residence card
- Firearms license

Employment & Pensions

- Employment contracts
- Pension/benefits statements
- Military service records
- Employment Insurance records
- Professional licenses
- Union memberships

Banking

- Safe deposit key/location
- Statements, agreements, debit card, cheques and bank books
- Mortgage information
- Credit card – agreements and statements
- Lines of credit/loan agreements

Investments

- Investment portfolio
- RRSP / RRIF / RESP, etc.
- Stocks, bonds, and investment certificates
- Annuities
- Dividend/interest income

Funeral/Cemetery

- Pre-arrangement contract
- Proof of Death certificate
- Medical certificate of death
- Cemetery – deed, marker/monument

Vehicles

- Ownership & registration
- Lease agreements



Real Estate

- Titles and deeds to properties domestic or foreign
- Income property statements
- Time-share agreements
- Leases or rental agreements
- Property tax statements

Insurance

- Insurance contract for: home, auto, life, accident & sickness, business, etc.
- Annuity statements
- Payment details
- Policy statements

Legal Documents

- Last Will & Testament
- Power of attorney
- Letters of probate
- Marriage license

Taxes

- Tax returns / assessments – 3 years prior
- Tax shelter documentation

Foreign National /Immigrant

- Government identification
- Pension
- Foreign property
- Passports

Utilities

- Cell phone
- Hydro/Gas
- Water heater rentals
- Cable/Satellite
- Phone