

SURVIVOR'S CHECKLIST

The following list will help give the survivor(s) and your estate administrator(s) [executor(s)] a quick idea of what must be done and the order in which to do them for the first weeks after your death.

Upon Death

1. In provinces that provide hospice care (Ontario), if you die at home and you are a hospice patient, someone should call the hospice agency to report your death. A hospice nurse will come to the home and pronounce you dead. The nurse may also call a mortuary and arrange for pickup of your body or,
2. If you die at home and are not a hospice patient, then someone should call 911. A coroner or medical examiner may be required at the scene if the death was sudden or,
3. If you die in a hospital or a retirement home the facility will likely help with the necessary arrangements for your body.
4. Someone must call a funeral home to come and pick up the body.

Shortly After Death

5. Call the estate administrator (executor) of the will. Do you have the contact information?
6. Ensure safety of children, pets, and property.
7. Along with the estate administrator (executor), read the will for any special instructions. Do you know where the will is located?
8. Authorize any donation of organs or tissue.
9. Determine whether there is to be a normal funeral with visitation, or the body is to be cremated.
10. Arrange a celebration of life, if the deceased has requested it.
11. Do the necessary planning and make the necessary arrangements for chosen service(s).
12. Call friends and family to notify them of the death and arrangements made.
13. Notify contacts in appointment book and cancel appointments.
14. Write and submit the obituary to newspaper(s), or have the funeral director do this.

15. Contact priest/rabbi/minister if requested.
16. Select music, photos, video, and flowers, as applicable.
17. Arrange for the safety of the home, if necessary.
18. Contact guardians of any minors.
19. Estate Administrator (Executor) should deal with payment for funeral arrangements, burial service and costs associated with celebration of life activities.
20. Choose clothing for deceased if there is a formal viewing.
21. Plan funeral car list and determine transportation for family and guests.
22. Greet visitors at visitation, funeral, and celebration of life.
23. Arrange for care and continuation of any business or farm.

After Burial or Other Disposition

24. Get copies of birth certificate, marriage certificate, and divorce decree.
25. Obtain at least one copy of death certificate.
26. Call Veterans Affairs (**1-800-267-0325**), if applicable, to see if they will pay the cost of the funeral or other arrangements.
27. Contact employer or previous employer, if applicable. Ask about unpaid wages, Insurance, pension, or other benefits.
28. Contact Public Service Pension Office (**1-800-561-7930**), or Canadian Forces Pension Office (**1-800-267-0325**) or the RCMP Pension Office (**1-855-502-7090**), for survivor benefits.
29. Contact Service Canada (**1-800-622-6232**) regarding Canada Pension Plan and Old Age Pension.
30. Apply for all available benefits from government.
31. Contact insurance companies and file a claim.
32. Contact bank and deal with bank accounts, loans, and mortgages.
33. Access and inventory safety deposit box(es). Do you know where the keys are?
34. Set up an estate bank account.
35. Review investments with the financial advisor.

36. Deal with RRSPs, RRIFs, TFSAs
37. Notify vehicle insurance company and arrange for insurance coverage until ownership is changed.
38. Assemble all unpaid bills.
39. Determine any other debts.
40. Get credit in your own name, if needed to pay bills before cash is available.
41. Obtain valuation of valuables.
42. Estate Administrator (Executor) to prepare inventory of all assets.
43. Meet with estate lawyer.
44. Meet with accountant.
45. Assist estate administrator (s) [executor(s)] and lawyer until estate is finalized.
46. Provide for continuation of any business as applicable or necessary.

Many of these tasks are performed by the estate administrator, but has there been enough planning to allow them to be dealt with efficiently?