

SERVICE LAW FIRM

78 Mary Street, P.O. Box 40, Stn. Main, Barrie, Ontario, L4M 4S9
 Phone.: (705) 737- 2123, Fax.: (705) 737- 2194

ESTATE ADMINISTRATION PROGRESS SHEET

Estate of _____

Date of Death _____

	TASK	Executor/Administrator		Solicitor	
		Whose Responsibility		Whose Responsibility	
		X	Date Completed	X	Date Completed
	PRELIMINARY MATTERS				
1	Search For Prepaid Funeral Arrangements				
2	Arrange Care For Pets				
3	Arrange Care and Management of Livestock and Crops				
4	First Interview between Executors and Lawyer				
5	Review Will				
6	Redirect Mail cancel subscriptions				
7	Cancel Health Insurance, Driver's License, Credit Cards, Telephone & Memberships				

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	TASK	Executor/Administrator		Solicitor	
		Whose Responsibility		Whose Responsibility	
		X	Date Completed	X	Date Completed
8	Order Death Certificate, Notarial Copies made				
9	Letters to: Banks Trust Companies Insurance Companies Credit Card Companies Pension Trustee Employer O.H.I.P. O.A.S. & C.P.P. Brokers				
10	Review all bank account records for direct debits and deposits - make alternate arrangements as necessary				
11	Real Estate: Secure properties Pay expenses Collect rents Check tenancy agreements Give notice				
12	Review insurance policies for continuation of coverage				

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	TASK	Executor/Administrator		Solicitor	
		Whose Responsibility		Whose Responsibility	
		X	Date Completed	X	Date Completed
13	List Safety Deposit Box				
14	Value Assets				
15	Secure Assets				
16	Prepare Inventory				
17	List Name, address and date of birth of each beneficiary				
18	Apply for Probate or Administration				
19	Prepare Notarial Copies of Certificate as needed				
20	Prepare Power of Attorney, Declaration of Transmission				
21	Open Estate Bank Account				
22	Close Deceased's Bank Account				
23	Advertise for Creditors				
24	Review Creditors' Claims				

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	TASK	Executor/Administrator		Solicitor	
		Whose Responsibility		Whose Responsibility	
		X	Date Completed	X	Date Completed
25	Review loan agreements, guarantees, leases, debts				
26	Pay debts				
27	Deliver specific assets to beneficiaries as per will				
28	Sell assets to raise cash needed by estate				
29	Prepare T-1 to date of death				
30	Apply for Clearance Certificate to date of death				
31	Pay Cash Legacies				
32	Obtain Receipts and Releases from beneficiaries				
33	Determine Plan of Distribution				
34	Obtain Approval of beneficiaries				

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	TASK	Executor/Administrator		Solicitor	
		Whose Responsibility		Whose Responsibility	
		X	Date Completed	X	Date Completed
35	Transfer Assets and/or Cash to beneficiaries				
36	Obtain Receipts and Releases				
37	Prepare Final Accounts				
38	Deliver Accounts to beneficiaries				
39	Prepare final T-3 Return and request Tax Clearance				
40	Obtain Tax Clearance				
41	Make Final Estate Distribution				
42	Close Estate Bank Account				
43	Prepare Final Report Letter to Executors				