

This checklist brings together important tasks for settling an estate.  
Our team is at your disposal to guide you through your efforts.

**T** 514 788-6485 | **Toll-free** 1-800-291-0337  
Monday to Thursday, 8 a.m. to 8 p.m. | Friday, 8 a.m. to 5 p.m.

## Preliminary steps

### Obtaining essential documents

- ☐ Proof of death
- ☐ Will and/or marriage contract

### Analysis of documents

- ☐ Testamentary provisions
- ☐ Declaration of inheritance  
(in the absence of a will)

### Legal formalities

- ☐ Registration of the designation of the executor  
(verification with the RDPRM)
- ☐ Validation of the will (if not notarized)

### Collection of information and documents

- ☐ Birth certificate, judgments (divorce, separation),  
deeds of donation, renunciations of family assets
- ☐ Inventory of safety deposit boxes

## Short-term steps

### Administrative management

- ☐ Detailed analysis of the documents collected
- ☐ Opening a dedicated bank account
- ☐ Publication of required notices

### Securing property and assets

- ☐ Protection of material goods  
and safekeeping of objects of value
- ☐ Verification of insurance  
(life, personal property and real estate)

### Communication with the parties concerned

- ☐ Notice to creditors and organizations (banks,  
insurance companies, employers, pension plans)
- ☐ Notifications to credit agencies  
(Equifax, Trans-Union)

### Termination of services

- ☐ Lease, utilities, subscriptions, permits,  
social media accounts

### Identification of assets

- ☐ Preliminary inventory of assets
- ☐ Confirmation of matrimonial regime  
and family assets

### Communication to legatees

- ☐ Explanation of testamentary provisions  
and next steps

## Medium-term steps

### Asset management

- ☐ Repatriation and interim management of assets
- ☐ Collection of income (rents, interest)
- ☐ Claims for annuities and insurance without designated beneficiaries

### Financial analysis

- ☐ Portfolio and liquidity
- ☐ Valuation of movable and immovable property
- ☐ Analysis of assets, liabilities, and fiscal impacts

### Administration of the estate

- ☐ Management of urgent debts
- ☐ Continuation of company activities, if applicable
- ☐ Ongoing communication with legatees and intermediaries

### Legal authorization

- ☐ Request for the certificate authorizing the partial distribution of assets

## Long-term steps

### Closure of the estate

- ☐ Division of family assets and matrimonial regime
- ☐ Transfer of assets (sale or transfer)
- ☐ Accounting update and closing of the inventory successorial

### Tax aspects

- ☐ Filing income tax returns (T1, TP1, T3, TP646)
- ☐ Paying taxes and receiving notices of assessment
- ☐ Providing tax slips to legatees

### Distributing assets

- ☐ Preparing financial statements and rendering accounts
- ☐ Paying legacies, delivering assets, and transferring to heirs
- ☐ Setting up trusts, if applicable

### Administrative closure

- ☐ Obtaining receipts from legatees
- ☐ Closing the estate account



**If you have any questions,  
please do not hesitate to contact us**

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