

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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