

Executor Timeline

Being an executor is a marathon, not a sprint.

The work doesn't end after the first week. Settling an estate typically takes 6-12 months (sometimes longer if it's complicated).

This timeline breaks down what needs to happen at each stage: the first week, the first month, the first three months, and the first year.

Use this as a guide, not a strict schedule. Every estate is different. Some things will take longer than expected. Some will move faster. That's normal.

Your timeline: What to expect and when

Your Executor Timeline

What to do and when, from the first week through to the end of the first year.

THE FIRST WEEK

Secure the property and valuables

Register the death (usually arranged by your funeral director; timing and process vary by province or territory, so check with them about how many certified copies to order)

Arrange the funeral

Locate the Will and this Estate Organizer

Contact the lawyer

Notify immediate family and close friends

Secure all financial documents

Start keeping detailed records

THE FIRST MONTH

Apply for probate if it's needed (whether it's required, where you apply, and how long it takes all vary by province or territory, so have your lawyer confirm what applies and point you to the right court)

Notify all relevant organizations (banks, retirement savings, Service Canada, insurers)

Cancel or transfer services

Secure and value all assets

Identify all debts

Claim life insurance

Claim registered-account proceeds and pension survivor benefits

Keep paying urgent bills

Your Executor Timeline (cont.)

THE FIRST THREE MONTHS

- Obtain Certificate of Appointment of Estate Trustee (if applicable)
- Open an estate bank account
- Collect all assets
- Pay all debts in the correct order
- File the final tax return
- Deal with property
- Manage business interests (if applicable)
- Cancel digital accounts (if instructed)
- Respond to creditors

THE FIRST SIX MONTHS

- Prepare estate accounts
- Obtain CRA clearance
- Prepare distribution schedule
- Communicate with beneficiaries
- Resolve any disputes

Your Executor Timeline (cont.)

THE FIRST YEAR

Distribute the estate

Finalize estate accounts

Close the estate bank account

Retain records

Executor compensation may be available, but the rules and process vary by province or territory, so check with your lawyer before claiming anything

NOTES: PROGRESS, DATES, AND ANYTHING OUTSTANDING