

Death Certificate & Post-Death Documents

This section is for your executor to complete after your death.

When someone dies, there are documents that need to be obtained and stored. The most important is the death certificate.

This section provides a place to keep copies of these documents organized and accessible.

For your executor:

After a death, you'll need to obtain several documents. Keep copies here for easy reference.

What documents to store here:

Death certificate. Issued by a doctor or hospital. Required to register the death.

Death Certificate. Issued by your provincial or territorial Vital Statistics office after the death is registered. It's worth ordering several certified copies, as many organisations ask for one; your funeral director or lawyer can suggest how many this estate is likely to need.

Certificate of Appointment of Estate Trustee. Issued by the Probate court. Gives you legal authority to administer the estate.

Certificate of Appointment of Estate Trustee Without a Will. If there's no Will, you'll apply for Certificate of Appointment of Estate Trustee Without a Will instead of Certificate of Appointment of Estate Trustee.

Final Tax Return. Once filed and cleared by the CRA.

CRA Clearance Certificate. Confirms the CRA is satisfied tax matters are settled. Getting this before distributing the estate protects the executor from personal liability, so your accountant or lawyer will usually advise waiting for it.

Final Estate Accounts. Summary of all assets, debts, expenses, and distributions.

How to use this section:

Attach copies of these documents as you receive them. Keep the originals in a safe place. These copies will be a quick reference when you need to check dates, details, or information.

Space for post-death documents

Your Death Certificate & Post-Death Documents

For your executor: a record of the official paperwork after death.

DEATH REGISTRATION DETAILS

DATE OF DEATH	PLACE OF DEATH
MEDICAL CERTIFICATE (ATTACHED / STORED AT)	REGISTERED WITH (VITAL STATISTICS, PROVINCE/TERRITORY)
DATE REGISTERED	REGISTRATION NUMBER

DEATH CERTIFICATES OBTAINED

NUMBER OF CERTIFIED COPIES	CERTIFICATE NUMBERS
WHERE ORIGINALS ARE STORED	COPIES SENT TO (TRACK DISTRIBUTION)

CERTIFICATE OF APPOINTMENT OF ESTATE TRUSTEE / CERTIFICATE OF APPOINTMENT OF EST

PROBATE / ADMINISTRATION / NOT REQUIRED	DATE APPLIED
COURT	GRANT NUMBER
DATE GRANTED	WHERE ORIGINAL IS STORED

Your Death Certificate & Post-Death Documents (cont.)

LAWYER HANDLING PROBATE

NAME

FIRM

PHONE

EMAIL

FINAL TAX & ESTATE ACCOUNTS

FINAL TAX RETURN FILED (DATE)

CRA CLEARANCE OBTAINED

FINAL ESTATE ACCOUNTS PREPARED

ESTATE BANK ACCOUNT CLOSED

ESTATE CLOSURE & DOCUMENT STORAGE

DATE ESTATE FINALIZED

WHERE ESTATE RECORDS ARE STORED

NOTES: ANYTHING ELSE ABOUT POST-DEATH DOCUMENTS