Executor (Personal Representative) Checklist – Alberta

This checklist outlines the key steps to settle an estate. Stay organized by keeping detailed records, communicate openly with beneficiaries, and approach every task with honesty and professionalism. Use this booklet as a guide to track which organizations to notify and what claims need to be completed.

Before You Begin

☐ Decide if you can do the job – If you don't feel capable, you can decline. The court can appoint an alternate or professional (e.g., trust company, lawyer). It's better to step aside early than risk mistakes.
☐ Seek legal/accounting advice to understand your obligations and liability.
☐ Consider the time commitment (can be months or years).

Safeguard & Manage

☐ Secure homes, vehicles, valuables; maintain insurance.
☐ Obtain multiple Death Certificates from the funeral home.
☐ Open an estate bank account for all money in/out.
☐ Notify banks and freeze personal accounts.
☐ Access safety deposit box if applicable.

Inventory & Value

☐ List all assets (bank accounts, RRSPs, TFSAs, pensions, real estate, investments, personal property).
☐ Cancel or transfer government benefits (CPP, OAS, GIS, Alberta Health, Alberta Seniors Benefits).
☐ Apply for eligible benefits: CPP Death Benefit, Survivor's Pension, Child's Benefit.
☐ Contact Veterans Affairs (if applicable).
☐ Notify employer or former employer regarding final pay, pensions, or group life insurance.
☐ Collect information from insurance companies (life, home, vehicle, AMA, etc.) and begin claims.
☐ Arrange professional appraisals for major assets.
☐ Publish notice to creditors and review outstanding debts.

Probate (if required)

☐ Work with a lawyer to apply for probate through Alberta's Surrogate Court.

Administer

☐ Pay debts, loans, and taxes before distributing assets.
☐ Transfer or close bank accounts, loans, and credit cards.
☐ Notify investment advisors and manage/sell holdings as needed.
☐ Sell, transfer, or distribute property and belongings as directed in the Will.
☐ Keep beneficiaries updated with progress reports.

Taxes

☐ Meet with accountant to ensure all tax filings are up to date.
☐ File the deceased's final ("terminal") tax return.
☐ File estate return if income is earned during administration.
☐ Obtain a CRA Clearance Certificate before final distribution.

Final Distribution

☐ Distribute assets according to the Will.
☐ Obtain signed releases from beneficiaries confirming receipt.

☐ Keep receipts, records, and correspondence for your protection.
☐ Update your own legal documents (Will, POA, Personal Directive) in light of your loved one's passing.

Important Reminders

- Reimbursement: Track all out-of-pocket expenses; you have the right to be reimbursed.
- Executor Fee: You may charge a fee (commonly 1–5% of the estate value), but discuss this with beneficiaries.
- Stay Professional: Be organized, honest, and communicative. If unsure, seek help from professionals.

Things People Often Forget

- Notify Alberta Land Titles for property ownership changes.
- Cancel/transfer vehicle registration and insurance.
- Address business interests (partnerships, shares, contracts).
- Close or memorialize digital accounts (email, banking, social media, subscriptions).
- Apply to stop/recalculate GST Credit or Canada Child Benefit.
- Provide a final estate accounting to beneficiaries (receipts in/out).
- Store estate records safely — beneficiaries can ask for them years later.

✅ **Tip:** Acting as an Executor is a legal and financial responsibility. If you are overwhelmed, ask for help—or decline the role before you start.