

# Practical Matters Checklist

## Personal Documents

- ☐ **Death Certificate**  
Contact the Vital Statistics Division to obtain the Death Certificate. It will be needed to cancel, transfer, or apply for benefits. There is no fee when issued within the first year of death.
- ☐ **Social Insurance Number (SIN)**  
When death occurs in a Canadian province, the provincial statistics agency automatically notifies the SIN Program. If the death occurs in a territory or outside Canada, provide proof of death at a Service Canada Centre.
- ☐ **Indian Status Cards**  
Contact Indigenous Services Canada or Band Office to cancel registration.
- ☐ **Passport**  
Mail valid passport to Passport Canada. Include a copy of the death certificate and letter indicating whether to destroy or return passport. Expired passports do not need to be return.
- ☐ **Birth Certificate**  
Contact the Vital Statistics Division to obtain a copy.
- ☐ **Driver's License**  
Contact the Motor Registration Division to cancel driver's license and apply for any unused portion of the license fee.

## Benefits and Employment

- ☐ **Canada Revenue Agency (CRA)**  
Contact the CRA as soon as possible to:
  - ☐ File an Income Tax Return
  - ☐ Cancel or transfer GST/HST Credit
- ☐ **Canada Pension Plan**  
Contact Service Canada to apply for survivor benefits.
- ☐ **Old Age Security Benefits**  
Contact Service Canada to cancel and inquire about entitlements.
- ☐ **Employer**  
Contact Employer for Record of Employment, T4, unpaid earnings, benefits, and pension plan.
- ☐ **Income Support**  
Contact local Income Support Office
- ☐ **Spousal/Child Support Agreements**  
Contact Support Enforcement Program.
- ☐ **Veterans Affairs Benefits**  
Contact Veterans Affairs Canada for available support and cancellation.

## Legal Matters

- ☐ **Estate and Will**  
Consult a lawyer to probate the will and address any outstanding legal matters.
- ☐ **Estate Account**  
Open a temporary estate account for estate-related transactions such as funeral costs and transfer of funds.

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## Property

- ☐ **Land Titles**  
Update property ownership with a lawyer and check for liens.
- ☐ **Homeowner and Vehicle Agreements**  
Provide notice to update, transfer, or cancel mortgage, rental, and lease agreements.
- ☐ **Vehicle Registration**  
Transfer ownership or check for liens.
- ☐ **Utility Accounts**  
Cancel or transfer account (electricity, phone, internet, heating).
- ☐ **Mail Redirection**  
Apply at Canada Post with Death Certificate.

## Insurance

- ☐ **Life/Mortgage Life Policies**  
Contact providers to cancel or make claims.
- ☐ **Homeowner & Vehicle Policies**  
Contact providers to cancel or update policies.
- ☐ **Private Health Coverage**  
Contact providers to make a claim, update, or cancel policy.
- ☐ **Funeral Expense Coverage**  
Contact providers to make a claim.

## Banking

- ☐ **Bank Accounts**  
Cancel bank card and transfer joint accounts.
- ☐ **Safety Deposit Box**  
Make an appointment to review contents.
- ☐ **Credit Cards, Loans, and Debts**  
Contact each Creditor to resolve the balance and close accounts.
- ☐ **Investments**  
Contact a financial advisor to discuss assets.

## Health Care

- ☐ **Medical Care Plan (MCP)**  
Contact MCP to cancel coverage.
- ☐ **Prescription Drugs**  
Contact pharmacy to close file. Return unused medication to pharmacy.
- ☐ **Health Care Providers**  
Contact doctors, dentists, and other providers to cancel scheduled appointments.

## Memberships

- ☐ **Gym and Others**  
Cancel any gym, or extracurricular memberships.
- ☐ **Rewards Programs**  
Cancel all service subscriptions.
- ☐ **Subscriptions**  
Inquire about point transfers.