

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.