CAMPBELL LAW
AND DISPUTE RESOLUTION
PROFESSIONAL CORPORATION

CHARLES M. CAMPBELL, B.A. (hons.), J.D.
BARRISTER, SOLICITOR & NOTARY PUBLIC

Estate Administration Intake Form

Deceased Information

- **Full Name** (Also known as):
- **Address**:
- **Occupation**:
- **Date and Place of Death**:
- **Date and Place of Birth**:
- **Marital Status**:
- **Name of Spouse** (Includes same-sex and common-law partners):
- **Date and Place of Marriage**:
- **Details of any Divorce Decrees, Dissolutions, Marriage Breakdowns, or Separations** (Including from same-sex and common-law partners):
- **Details of any Property Regimes**:
- **Doctor**:
  - **Address of Doctor**:
- **Domicile**:
- **Residence for Tax Purposes**:
- **Social Insurance Number**:
- **Employer**:
  - **Address of Employer**:

Wills

- Is there more than one Will? No [ ] Yes [ ]
  - **Location of Original Will(s) and Codicil(s)**:
  - **Date(s)**:
  - **Witnesses**:
    - **Name**:
    - **Address**:
    - **Occupation**:
  - **Has Affidavit of Execution been Completed?** Yes [ ] No [ ]
  - **Was Will Virtually Executed?** Yes [ ] No [ ]
    - How is the Virtual Execution Documented:
      - Indicated on the Affidavit of Execution Yes [ ] No [ ]
      - Other [ ]
  - **Witnessing Parties and the Testator Signed on Different but Identical Copies**: Yes [ ] No [ ]
    - If so, have all signed copies or counterparts been located? Yes [ ] No [ ]
  - **If both witnesses are deceased, who can swear to**:
    - (i) Death of each
    - (ii) Signature of each
    - (iii) Signature of deceased

Personal Representatives (Potential Estate Trustees)

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1. **Full Name**:
    - **Occupation**:
    - **Address**:
    - **Telephone**: (home) (business) (cell)
    - **Email Address**:
    - **Preferred Method of Contact**:
    - **Acknowledgment of Email Risks**: Initials [ ]
2. **Full Name**:
    - **Occupation**:
    - **Address**:
    - **Telephone**: (home) (business) (cell)
    - **Email Address**:
    - **Preferred Method of Contact**:
    - **Acknowledgment of Email Risks**: Initials [ ]
3. **Full Name**:
    - **Occupation**:
    - **Address**:
    - **Telephone**: (home) (business) (cell)
    - **Email Address**:
    - **Preferred Method of Contact**:
    - **Acknowledgment of Email Risks**: Initials [ ]

- **Deceased Executors**:
    - **Name**:
    - **Date of Death**:
    - **Will Any Executors Renounce?**
    - **Are Any Executors Below Age of Majority?** Yes [ ] No [ ]
        - If yes, provide name and date of birth.
    - **Is the Appointment of Any Executor Conditional or Contingent?**

Beneficiaries or Next of Kin (If No Will)

1. **Name**:
    - **Address**:
    - **Age**:
    - **Relationship to Deceased**:
    - **Share in Estate**:

- **Are Any of the Beneficiaries Deceased?**
    - **Name**:
    - **Date of Death**:
    - **Relationship to Deceased**:
    - **Share in Estate**:
- **Does Deceased Beneficiary Have a Living Spouse, Children, Grandchildren, or Great-grandchildren?**
    - **Name**:
    - **Address**:
    - **Age**:

    - **Relationship to Deceased**:
- **Does Deceased Have Any Children Born Outside of Marriage?**
    - **Name**:
    - **Address**:
    - **Age**:
    - **Name and Address of Other Parent**:
    - **Share in Estate**:
- **Does Deceased Have Any Step-children?**
    - **Name**:
    - **Address**:
    - **Age**:
    - **Share in Estate**:
- **Is There a Likelihood of Any Posthumously-Conceived Children?** If yes, please explain.
- **Do Any Beneficiaries or Next of Kin Have Children Born Outside of Marriage or Step-children?**
    - **Name**:
    - **Address**:
    - **Age**:
    - **Relationship to Deceased**:
    - **Share in Estate**:

Assets

- **Safety Deposit Box(es)**
    - **Location**:
    - **Box Number**:
    - **Registered Name**:
    - **Location of Key**:
- **Real Property**:
    - **Property 1**:
        - **Street Address or Location**:
        - **Name(s) on Title**:
        - **How is Title Held**: [ ] Sole owner [ ] Joint Tenants [ ] Tenants in Common
        - **Location of Transfer/Deed of Land**:
        - **Purchase Price and Date of Purchase**:
        - **Current Market Value**:
        - **Encumbrances**:
            - **Name of Mortgagee/Chargee**:
            - **Address**:
            - **Mortgage/Charge Number**:
            - **Principal**:
            - **Interest**:
            - **Maturity Date**:
            - **Name and Address of Insurer**:
    - **Is Real Property Rented?**
        - **Tenant's Name**:

        - **Address**:
        - **Amount of Rent**:
        - **Due Date**:
        - **Length of Lease**:
        - **Date of Last Rent Increase**:
    - **If Real Property is Out of Jurisdiction, Who was Local Solicitor?**
        - **Name**:
        - **Address**:
- **Land Mortgages/Charges Owned by Deceased**:
    - **Location of Charge/Mortgage**:
    - **Principal**:
    - **Monthly Payments**:
    - **Interest Rate**:
    - **Names and Addresses of Chargers/Mortgagors**:
    - **Name and Address of Insurer**:
- **Agreements for Sale**:
    - **Real Estate**:
    - **Other**:
- **Insurance, Annuities, RRSP's, DPSP's, Pensions, TFSA's, RESP's, and RRIF's**
    - **No.**:
    - **Issued by**:
    - **Beneficiary**:
    - **Value of Benefit to Estate**:
    - **Name of Insurance Advisor**:
- **Money on Deposit**:
    - **Name and Address of Bank or Depository**:
    - **Type of Account and No.**:
    - **Ownership**:
    - **Approximate Amount**:
- **Shares, Bonds, Debentures, and Guaranteed Investment Certificates**:
    - **Approximate Value of Portfolio**: $_____
    - **Description** (including Number):
    - **Acquisition Cost and Date**:
    - **Current Value**:
    - **Registration**:
        - Are there any restrictions on transfer?
        - Are shares subject to buy-sell agreement? (Obtain copies of all relevant agreements)
    - **Name of Investment Advisor**:
    - **Telephone**:
- **Employee Stock Options**:
    - **Description**:
    - **Number**:
    - **Value**:

- - **Conditions of Exercise**:
- **Interests in Partnership or Unincorporated Business** (Obtain copies of all agreements)
- **Debts Owing to the Deceased Including Promissory Notes** (Obtain copies of all notes)
  - **Date of Note**:
  - **Principal Amount Owed**:
  - **By Whom** (Relationship):
    - Has the note expired?
    - Have payments been made on account of principal or interest?
    - Has any part of the interest or principal been forgiven by the deceased?
    - Does the will forgive the interest and/or capital owing on the promissory note or bring it into hotchpot in distributing the estate?
- **Automobiles, Boats, and Recreation Vehicles**
  - **Description**:
  - **Ownership**:
  - **Value**:
- **Farm Machinery, Tools, Livestock, and Quotas**
- **Heirlooms, Works of Art, Plate, Jewellery, and Any Collections, etc.**
- **Household Goods and Furniture**
- **Digital Assets** (Confirm that usernames and passwords are known)
  - **Hardware** (e.g., computers, mobile phones, netbooks, notebooks)
  - **E-mail Accounts**
  - **Social Media Accounts** (e.g. Facebook, Instagram, Pinterest)
  - **Blogs, Domain Names, and Websites**
  - **Photo Accounts**
  - **Financial Accounts Including Cryptocurrency Wallets Including Those on Exchanges Like Coinbase**
    - A review of bank account statements will sometimes uncover debits made in favour of these exchanges. This review should also identify accounts like PayPal, iTunes, GeekSquad, etc.
- **Other Assets**:
  - **Interest in an Inter Vivos or Testamentary Trust** (Obtain copy of document)
  - **Power of Appointment** (Obtain copy of document)
  - **Uncashed Travelers Cheques**
  - **Accrued Holiday Pay**
  - **Brokerage Account**
  - **Royalties**
  - **Commissions**
  - **CCP or EI Cheques for Month of Death**
  - **Airmiles and Other Loyalty Plans**
- **Total Value of Assets**: $_____

Debts Including Mortgages/Charges

- **Creditor**:
  - **Principal**:
  - **Interest**:

    - **Maturity**:
- **Total Value of Debts**: $_____

Approximate Net Value of Estate: $_____

Miscellaneous

- **Any Powers of Attorney, Personal Guarantees, etc. Made by the Deceased** Yes [ ] No [ ]
- **Any Legal Actions Pending by or Against Deceased** Yes [ ] No [ ]
- **Is Deceased the Surviving Executor of an Estate** Yes [ ] No [ ]
- **Is Deceased Sole Custodian, Committee, Trustee, etc. of Any Person or Property** Yes [ ] No [ ]
- **Any Request for Notice of Commencement of Proceedings Filed** Yes [ ] No [ ]
- **Are There Any Other Persons with a Financial Interest in the Property in the Deceased's Estate** Yes [ ] No [ ]

Canada Pension

- **Did Deceased Contribute** Yes [ ] No [ ]
    - If so, obtain the following documents:
        - **Social Insurance Cards of Deceased and Spouse**
        - **Birth Certificates for Deceased, Spouse, and All Dependants**
        - **Death Certificate**
        - **Marriage Certificate**
    - **Name and Address of Employer for Last Two Years of Employment**:
    - **Date of Retirement**:

Income Tax Information

- **Date of Last Income Tax Return**:
- **Location of Income Tax Returns for Last Five Years**:
- **Name of Accountant and Telephone No.**:
    - Business: _____ Cell:_____
- **Details of Instalment Payments**:
- **Name and Contact Information for Deceased's Accountant, Financial Advisor, or Other Person Familiar with His or Her Business or Private Affairs**:
    - **Name**:
    - **Role**:
    - **Address**:
    - **Phone/Cell Number**:
    - **Email**:

Any Other Relevant Information

Documents to Bring

- ☐ Wills, Codicils, and Affidavits of Execution (Originals or copies if originals cannot be found)
- ☐ If Wills were Virtually Executed, any documentation related to the circumstances surrounding the execution (e.g. reporting letter from the witnessing lawyer or paralegal; video recording)
- ☐ Memoranda and notes made by deceased regarding funeral, personal articles, guidelines re investments and distributions, etc.
- ☐ Funeral Director's Proof of Death
- ☐ Birth Certificate
- ☐ Marriage Certificate
- ☐ Address Book of Deceased
- ☐ Usernames and Passwords for Websites and Online Applications Used by the Deceased
- ☐ Contact Information of Accountants, Financial Advisors, etc.
- ☐ Agreements and Orders to which Deceased was a Party or under which he or she was Liable (e.g. separation agreement, maintenance order, divorce decree, nullity decree, guarantee, agreement of purchase and sale, buy-sell agreement, partnership agreement, or employment agreement)
- ☐ Income Tax Returns for Last Six Years, Accounting Records, and Records of Adjusted Cost Base of Assets
- ☐ Annuities, Registered Saving Plans, Pensions, and Death Benefits (e.g. CPP, OAS, pension plan, RRSP, RRIF, DPSP, RESP, TFSA)
- ☐ Account Statements for Investment Accounts (Registered and Unregistered)
- ☐ Copies of Share Certificates, Bonds, Promissory Notes, and Other Security Certificates Not Registered with a Brokerage
- ☐ Deeds, Leases, Mortgages, and Recent Tax Assessments and Bills for Real Properties
- ☐ Bank Books and Statements, Updated to Date of Death
- ☐ Information about Businesses and Private Companies in which Deceased had an Interest, including:
    - Financial Statements
    - Shareholders Agreements, Partnership Agreements, and Option Agreements
- ☐ Insurance on Deceased's Life (including insurance to cover credit card or mortgage balance)
- ☐ Insurance Owned by Deceased on Lives of Others
- ☐ Copies of Wills and Trust Agreements of which Deceased was an Estate Trustee, Trustee, or Beneficiary, or over which Deceased had a Power of Appointment