

# Duties of an Executor

1. Locate and review will
2. Deal with intentions as to donation of organs, cremation or burial
3. Contact and/or retain lawyer for advice and assistance
4. Contact life insurance company to help cover immediate expenses
5. Give notice to beneficiaries regarding the contents of the will.
6. Locate and protect assets
7. Protect business interests
8. Collect valuables
9. Open estate bank account
10. Ensure all property is insured
11. Assemble and value assets (e.g., real property, furniture, bank accounts, securities, business interests, jewellery)
12. View safety deposit box to determine contents
13. Determine if there are any agreements that apply to the assets (e.g., buy-sell agreement, Shareholders Agreement)
14. Determine if there is property located out of the province
15. Apply for Canadian Pension Plan Benefits
16. Notify Blue Cross and Alberta Health Care
17. Order death certificates if required
18. Cancel credit cards; obtain final statements
19. Redirect mail
20. Cancel subscriptions, memberships, etc.
21. Arrange for the transfer of jointly held assets
22. Assist lawyer in preparation of documents to apply for a Grant of Probate
23. Contact lawyer and Public Trustee if minors are involved
24. Determine with lawyer applicability of legislation (e.g., Family Relief Act, Matrimonial Property Act)
25. Advertise for creditors
26. File tax returns; obtain clearance certificate
27. Pay taxes, debts, funeral expenses, etc.
28. Prepare an accounting of the administration of the estate
29. Determine if any matrimonial agreement might affect the distribution of the assets
30. Defend or commence lawsuits as necessary
31. Convert assets to cash where appropriate
32. Determine your fee and obtain approval from the beneficiaries or by court order
33. Prepare and have all beneficiaries sign a release
34. Distribute the assets of the estate