Personal Representatives' Duties

1 Making arrangements for the disposition of the body and for funeral, memorial or other similar services.

2 Determining the names and addresses of those beneficially entitled to the estate property and notifying them of their interests.

3 Arranging with a bank, trust company or other financial institution for a list of the contents of a safety deposit box.

4 Determining the full nature and value of property and debts of the deceased as at the date of death and compiling a list, including the value of all land and buildings and a summary of outstanding mortgages, leases and other encumbrances.

5 Examining existing insurance policies, advising insurance companies of the death and placing additional insurance, if necessary.

6 Protecting or securing the safety of any estate property.

7 Providing for the protection and supervision of vacant land and buildings.

8 Arranging for the proper management of the estate property, including continuing business operations, taking control of property and selling property.

9 Retaining a lawyer to advise on the administration of the estate, to apply for a grant from the court or to bring any matter before the court.

10 Applying for any pensions, annuities, death benefits, life insurance or other benefits payable to the estate.

11 Advising any joint tenancy beneficiaries of the death of the deceased.

12 Advising any designated beneficiaries of their interests under life insurance or other property passing outside the will.

13 Arranging for the payment of debts and expenses owed by the deceased and the estate.

14 Determining whether to advertise for claimants, checking all claims and making payments as funds become available.

15 Taking the steps necessary to finalize the amount payable if the legitimacy or amount of a debt is in issue.

16 Determining the income tax or other tax liability of the deceased and of the estate, filing the necessary returns, paying any tax owing and obtaining income tax or other tax clearance certificates before distributing the estate property.

17 Instructing a lawyer in any litigation.

18 Administering any continuing testamentary trusts or trusts for minors.

19 Preparing the personal representative’s financial statements, a proposed compensation schedule and a proposed final distribution schedule.

20 Distributing the estate property in accordance with the will or intestate succession provisions.