

Required Documents for Deceased Persons

- Death Certificate
- Last Will and Testament
 - If there is no will, a copy of the probate
- Prior year T1 return (if our office did not prepare the prior year T1)

If applicable, please also provide:

- Investments: value at the date of death
 - Includes RRSPs, RRIFs, TFSAs, and non-registered investments
- Homes or other real estate
 - Details of ownership (i.e., owned solely by the deceased or jointly)
 - Address of principal residence and the year it was acquired
 - Fair market value at the date of death

NOTE: Clearance certificates will not be filed for estates in which the executor of the Last Will and Testament are part of the estate.