Executor Estate T3 Document Checklist

What to gather before your estate T3 engagement begins

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Complete information up front speeds up the work and avoids delays during a sensitive time. Gather what you can from this list before the first meeting, and we will guide the rest.

- [ ] **1 Certified copy of the will**
  And any codicils or amendments to it.
- [ ] **2 Probate or appointment letters**
  Confirming your authority as executor or estate trustee.
- [ ] **3 The death certificate**
  Required to notify the CRA and open the estate.
- [ ] **4 Beneficiary list with contacts**
  Names, addresses, and residency for allocations and slips.
- [ ] **5 Date-of-death asset valuations**
  Investments, property, and shares valued at the date of death.
- [ ] **6 Adjusted cost base records**
  So the deemed disposition and gains can be calculated.
- [ ] **7 Prior personal tax returns**
  The deceased's recent T1 returns and notices of assessment.
- [ ] **8 Corporate charts and insurance**
  Holding company structure and policies relevant to the estate.

PRO TIP

Never distribute the estate before the TX19 clearance certificate. If a reassessment follows, the CRA can pursue you

What happens next

1. **Free consultation**
   We review the estate and map the returns.
2. **Flat fee, HST included**
   Quoted in writing before any work starts.
3. **Guided to clearance**
   From the terminal return to the TX19.

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