

TERMINAL RETURN AND ESTATE CHECKLIST

- Personal income tax returns for the last 3 years
- Mailing addresses
- Notices of assessment/Reassessment for the past 3 years
- Schedule of unused losses (capital, non-capital, business)
- Copy of will, death certificate, probate certificate and list of assets submitted for probate
- Terminal return (if already filed)
- T-slips
- Investment statements – bank and/or broker
- RRSP and RRIF statements
- Bank statements
- Documentation on any properties in the trust and any activity on those properties
- Documentation on assets or businesses in foreign countries
- CPP death benefit information