

Dealing with the loss of a loved one

- Contact funeral home or transfer service provided by a funeral home to transport the deceased's body after death.
- Contact funeral director, they can help you make all the arrangements for the funeral.
- Have Funeral Home Director prepare a Death Certificate.
- Cancel personal documents or Cards of the Deceased

Passport-the passport should be returned to Passport Canada with a copy of the death certificate and a letter indicating if the cancelled passport should be destroyed or returned to you.

Return Social Insurance Card (SIN)- the next of kin should return SIN card along with a copy of the death certificate or a Statement of Death to Service Canada.

Driver's License

Heath Cards

Banks

Financial Institutions

Financial Advisor

- Notify the Canada Revenue Agency of the Death
- Cancel Old Age Security and Canada Pension Plan Benefits
- Apply for any Survivor Benefits for which you may be eligible. If the deceased has children left behind, apply for Children's Benefit on their behalf.
- Contact former employers about pensions and life insurance companies about any policies. Update policies where the deceased was a beneficiary.
- Change ownership of property like cars, boats, motor homes and real estate.
- Update accounts with utilities and other services like phones, cable and hydro.
- Update or cancel any club memberships or other affiliations.
- Update your Will and Power of Attorney if necessary.
- Make an appointment with an accountant to file the deceased's tax return.

See page 2...Questions for your Financial Advisor:

☐ Questions for your Financial Advisor:

1. How do I transfer my spouse's investment assets into my name and what documents will I need?
2. Will I need to create a new investment portfolio?
3. Do I need a new Will?
4. How will my estate plans change?
5. Should I consider transferring assets to my family now?
6. How will my budget change?
7. I may decide to sell my home, what are the implications?
8. Will I need new or different insurance coverage?