

BC Probate Executor Checklist

A Step-by-Step Guide for Estate Administrators

Before You Begin

This checklist covers the complete BC probate process from initial notification through estate distribution. Use it to track your progress and ensure no critical steps are missed.

Important: This checklist is for general guidance only. Always consult a qualified BC estate lawyer before taking action.

PHASE 1: INITIAL STEPS (Before Probate Application)

Immediate Actions (Days 1–7)

- **Locate and secure the original Will**
 - Check with the deceased’s lawyer, accountant, or family members
 - If no Will is found, the estate is intestate—consult a lawyer immediately
- **Obtain multiple certified death certificates**
 - Order at least 10–15 copies from Vital Statistics BC
 - Required for bank accounts, insurance, property transfer, and court filings
 - Cost: ~\$35 per copy
- **Secure the deceased’s home and assets**
 - Change locks if necessary
 - Confirm home insurance coverage (many policies limit coverage for vacant properties after 30 days)
 - Arrange regular property inspections
 - Maintain utilities and property taxes
- **Locate financial and legal documents**

- Bank account statements
- Investment account statements
- Life insurance policies
- Mortgage documents
- Property deeds
- Tax returns (last 3 years)
- Business documents (if applicable)
- **[] Notify key institutions**
 - Banks and financial institutions
 - Insurance companies
 - Employer (if deceased was working)
 - Canada Revenue Agency (CRA)
 - Service Canada (CPP/OAS)
 - Utilities and service providers

Preparation Phase (Days 7–21)

- **[] Retain a BC estate lawyer**
 - Interview at least 2–3 lawyers specializing in probate
 - Confirm their experience with White Rock and South Surrey estates
 - Discuss fees (hourly, flat fee, or percentage-based)
- **[] Retain a CPA or accountant**
 - Needed for estate tax returns, deemed disposition analysis, and capital gains calculation
 - Confirm they understand BC probate requirements
- **[] Create a preliminary asset inventory**
 - List all real estate, bank accounts, investments, vehicles, and personal property
 - Estimate values (do not finalize yet)
 - Note any jointly held assets or assets with named beneficiaries
- **[] Identify all beneficiaries and interested parties**
 - Beneficiaries named in the Will

- Spouse and children (even if not named in Will)
 - Potential heirs under intestacy laws
 - Creditors and debtors
 - **[] Gather contact information for all interested parties**
 - Full legal names and addresses
 - Phone numbers and email addresses
 - Keep detailed records for Form P9 (Affidavit of Delivery)
-

PHASE 2: NOTIFICATION (Form P1 – 21 Days Before Application)

Form P1 Preparation

- **[] Complete Form P1 — Notice of Proposed Application in Relation to Estate**
 - Available at: BC Supreme Court website
 - Include: deceased's name, date of death, will information, executor details
 - Specify the 21-day waiting period start date
- **[] Prepare notification package**
 - Cover letter explaining the probate process
 - Copy of the Will (if available)
 - Form P1
 - List of all interested parties
- **[] Notify all required parties (minimum 21 days before filing)**
 - All executors and alternate executors named in the Will
 - All beneficiaries listed in the Will
 - The deceased's spouse (if any)
 - The deceased's children (if any)
 - Potential heirs under intestacy laws
 - Public Guardian and Trustee (if minors or incapable adults are beneficiaries)
 - Nisga'a Lisims Government or Treaty First Nation (if applicable)

- **[] Send notifications by registered mail or in person**
 - Keep proof of delivery for all notifications
 - Document dates, methods, and recipient information
 - Use registered mail for critical notifications
 - **[] Record the 21-day waiting period start date**
 - Do not file the probate application before this period expires
 - Mark the calendar for the earliest filing date
-

PHASE 3: PROBATE APPLICATION PREPARATION (After 21-Day Wait)

Document Gathering

- **[] Obtain the original signed Will**
 - If original is unavailable, gather evidence of its validity
 - Consult your lawyer about alternative documentation
- **[] Prepare certified death certificate**
 - Obtain from Vital Statistics BC
 - Required for court filing
- **[] Complete Form P2 — Submission for Estate Grant**
 - Part 1: Information about the deceased
 - Part 2: Executor/applicant information
 - Part 3: List of documents being filed
 - Part 4: Schedule of assets and liabilities
- **[] Complete Form P3 or P4 — Affidavit of Applicant**
 - Confirms your identity and relationship to the deceased
 - Sworn before a notary public or lawyer
- **[] Complete Form P9 — Affidavit of Delivery**
 - Confirms you have notified all required parties

- Include dates and methods of notification
- Attach proof of delivery (registered mail receipts, etc.)
- **[] Complete Form P10 or P11 — Affidavit of Assets and Liabilities**
 - Comprehensive inventory of all estate assets
 - List all liabilities and debts
 - Provide estimated fair market values
 - Include supporting documentation (bank statements, appraisals, etc.)

Financial Documentation

- **[] Obtain professional appraisal of real estate**
 - Required for fair market value determination
 - Essential for capital gains tax calculation
 - Use certified appraiser (NLD Appraisals or similar)
- **[] Gather bank account statements**
 - All accounts held in deceased's name alone
 - Account balances as of date of death
 - Include joint accounts (if applicable)
- **[] Collect investment account statements**
 - Stocks, bonds, mutual funds, GICs
 - Record values as of date of death
- **[] Locate life insurance policies**
 - Note beneficiary designations
 - If payable to the estate, include in asset inventory
 - If payable to named beneficiary, exclude from probate estate
- **[] Document vehicle ownership**
 - Vehicle registration and title
 - Estimated value (NADA Guides or similar)
- **[] List personal property**
 - Jewelry, art, collectibles, furniture

- Estimate values (professional appraisal if high value)
- **Identify all debts and liabilities**
 - Mortgages (principal and interest owing)
 - Credit card balances
 - Bank loans and lines of credit
 - Property taxes owing
 - Utility bills
 - Funeral expenses
 - Professional fees (lawyer, accountant, appraiser)

Tax and Financial Review

- **Consult with CPA on tax implications**
 - Deemed disposition rules at death
 - Principal residence exemption eligibility
 - Capital gains calculation
 - T3 Trust return requirements
 - **Calculate estimated probate fees**
 - Court filing fee: 200(*forestatesover25,000*)
 - Probate fee: 0.6% for 25,001–50,000; 1.4% over \$50,000
 - Budget accordingly
 - **Prepare estate accounting**
 - Document all income and expenses
 - Track professional fees
 - Record property maintenance costs
-

PHASE 4: COURT FILING (4–8 Weeks Processing)

Filing the Application

- **Prepare final probate application package**

- Form P2 (Submission for Estate Grant)
- Form P3/P4 (Affidavit of Applicant)
- Form P9 (Affidavit of Delivery)
- Form P10/P11 (Affidavit of Assets and Liabilities)
- Original signed Will
- Certified death certificate
- Supporting documentation (appraisals, bank statements, etc.)
- **[] Have affidavits sworn before notary or lawyer**
 - All affidavits must be properly sworn
 - Notary or lawyer must sign and stamp
- **[] File application at BC Supreme Court Probate Registry**
 - In person at your local registry, or
 - Electronically through BC's online court services
 - Keep filing receipts and confirmation numbers
- **[] Pay court filing fee**
 - *200 filing fee for estates over 25,000*
 - Payment method varies by registry
- **[] Publish Notice to Creditors in BC Gazette**
 - Required under Section 154 of WESA
 - Allows creditors to come forward with claims
 - Typically 2–3 month creditor period
 - Keep copy of gazette notice
- **[] Track application status**
 - Contact registry regularly for updates
 - Respond promptly to any court requests for additional information
 - Typical processing time: 4–8 weeks

Awaiting Grant of Probate

- **[] Maintain property during probate period**

- Continue insurance coverage
 - Pay property taxes and utilities
 - Arrange regular inspections
 - Document all maintenance expenses
 - **Secure financial accounts**
 - Notify banks that probate is pending
 - Do not make distributions until Grant of Probate is received
 - **Respond to creditor inquiries**
 - Review all claims against the estate
 - Consult lawyer regarding disputed claims
 - **Prepare for property sale (if applicable)**
 - Obtain pre-listing home inspection
 - Plan any necessary repairs or updates
 - Consult realtor on market conditions
-

PHASE 5: POST-GRANT ADMINISTRATION (After Grant of Probate Issued)

Receiving the Grant

- **Obtain certified copies of Grant of Probate**
 - Order at least 5–10 copies from the court
 - Required for property transfer, bank account transfers, etc.
- **Notify all interested parties of Grant**
 - Send copy to all beneficiaries
 - Notify banks, investment firms, and other institutions
- **Review Grant for accuracy**
 - Verify all asset values and liabilities are correct
 - Check executor name and authority

- Contact court immediately if errors are found

Property Management

- **[] If selling the property:**

- Obtain professional market valuation (comparative market analysis)
- Declutter and prepare home for sale
- Complete strategic repairs (cosmetic improvements, not major renovations)
- Stage the property professionally
- List with licensed BC realtor experienced in estate sales
- Disclose all known material facts (oil tanks, aluminum wiring, unpermitted renovations, etc.)
- Review all offers carefully (price, deposit, financing, completion date)
- Coordinate with estate lawyer for title transfer

- **[] If retaining the property:**

- Continue insurance and property maintenance
- Update property tax records
- Arrange for ongoing management or rental

Financial Administration

- **[] Manage estate bank account**

- Open estate bank account if not already done
- Deposit all estate funds
- Pay all outstanding debts from estate funds
- Keep detailed records of all transactions

- **[] Pay all estate debts and liabilities**

- Mortgages (if property is being sold)
- Credit card balances
- Bank loans
- Property taxes
- Utility bills
- Funeral expenses

- Professional fees (lawyer, accountant, realtor, appraiser)
- **File final tax return for deceased (T1)**
 - Deadline: 6 months after death (or later if extension granted)
 - Include all income to date of death
 - Claim any deductions or credits
 - Consult CPA for guidance
- **File T3 Trust return (if applicable)**
 - Required if estate income is earned after death
 - Deadline: 90 days after year-end
 - Distribute T3 slips to beneficiaries
- **Calculate capital gains tax**
 - Deemed disposition of real estate at fair market value on date of death
 - Capital gains = (sale price – fair market value on death date) ÷ 2
 - Principal residence exemption may apply
 - Consult CPA for calculation and reporting

Property Sale (If Applicable)

- **Coordinate title transfer with lawyer**
 - Obtain title search
 - Prepare transfer documents
 - Register transfer at Land Title Office
 - Ensure all liens and mortgages are discharged
- **Complete property sale**
 - Coordinate closing date with buyer
 - Arrange property inspection by buyer
 - Resolve any final issues
 - Receive sale proceeds
- **Pay sale-related expenses**
 - Real estate commission (typically 4–5%)

- Legal fees for title transfer
 - Property tax adjustments
 - Utility adjustments
 - Any other closing costs
-

PHASE 6: FINAL DISTRIBUTION (6–18 Months Total)

Final Accounting

- **Prepare detailed estate accounting**
 - List all assets received
 - List all debts paid
 - List all expenses incurred
 - Calculate net estate value
 - Show distribution to each beneficiary
- **Obtain beneficiary approval (if required)**
 - Provide accounting to all beneficiaries
 - Address any questions or concerns
 - Obtain written approval before final distribution
- **File final tax returns**
 - Ensure all T1 and T3 returns are filed
 - Obtain CRA clearance certificate (if required)
 - Keep copies for estate records

Distribution to Beneficiaries

- **Calculate each beneficiary's share**
 - According to the Will (or intestacy laws if no Will)
 - Account for any advances or gifts made during administration
- **Prepare distribution cheques or transfers**
 - Make payable to each beneficiary

- Obtain signed receipts from beneficiaries
- Keep copies for estate records
- **[] Distribute personal property**
 - Transfer vehicles to beneficiaries
 - Deliver jewelry, art, and other items
 - Obtain signed receipts
- **[] Close estate bank account**
 - After all distributions are complete
 - Obtain final statement
 - Keep for estate records

Final Documentation

- **[] Prepare estate closure summary**
 - Summary of all actions taken
 - Final accounting
 - Proof of all distributions
 - Copies of all tax returns filed
 - **[] File estate closure documents (if required)**
 - Some courts require formal closure notification
 - Consult your lawyer
 - **[] Retain estate records**
 - Keep all documents for minimum 6 years
 - May be required for tax audit or beneficiary disputes
 - **[] Notify all institutions of estate closure**
 - Banks and financial institutions
 - Insurance companies
 - Property tax assessor
 - Any other relevant parties
-

KEY CONTACTS & RESOURCES

BC Government Resources

- BC Vital Statistics: <https://www2.gov.bc.ca/gov/content/life-events/death/after-death>
- BC Supreme Court Probate Rules: https://www.courts.gov.bc.ca/supreme_court/practice_and_procedure/probate_rules.aspx
- Wills, Estates and Succession Act (WESA): https://www.bclaws.gov.bc.ca/civix/document/id/complete/statreg/09013_01
- CRA — Deceased Persons: <https://www.canada.ca/taxes/individuals/life-events/what-happens-when-someone-dies>

Local White Rock & South Surrey Services

- **Estate Lawyers:** [See Services Directory at BC Estate Homes]
- **Property Appraisers:** NLD Appraisals (604-725-5325)
- **Licensed Realtors:** [See Services Directory at BC Estate Homes]
- **Estate Accountants:** [See Services Directory at BC Estate Homes]

Important Dates to Track

- **Date of Death:** _____
 - **21-Day Notification Period Ends:** _____
 - **Probate Application Filing Date:** _____
 - **Expected Grant of Probate Date:** _____
 - **Property Sale Completion Date (if applicable):** _____
 - **Final Tax Return Deadline:** _____
 - **T3 Return Deadline (if applicable):** _____
-

NOTES & REMINDERS

Critical Points:

1. **Always consult a BC estate lawyer** — Probate law is complex and fact-specific. Never proceed without professional guidance.

2. **Keep detailed records** — Document all actions, dates, expenses, and communications. You may need to defend your decisions to beneficiaries or the court.
 3. **Act prudently and reasonably** — Your duty as executor is to act in the best interests of the estate and beneficiaries. Avoid conflicts of interest.
 4. **Don't rush the sale** — Take time to obtain fair market value. Accepting the first offer is rarely in the estate's best interest.
 5. **Budget for professional fees** — Estate administration typically costs 3–5% of estate value in legal, accounting, and appraisal fees.
 6. **Communicate with beneficiaries** — Keep beneficiaries informed throughout the process. Transparency reduces disputes.
-

Disclaimer: This checklist is provided for general guidance only and does not constitute legal, financial, or real estate advice. Every estate is unique. Always consult qualified professionals for your specific situation.

Last Updated: March 2026

For more information, visit: BC Estate Homes — <https://bc-estate-homes.manus.space/>