BC Executor & Administrator Checklist

Probate and estate administration in British Columbia, step by step

PART 1: GETTING THE GRANT (STEPS 1-6)

Is probate needed? Usually yes if the deceased held assets in their sole name worth over $25,000 (real property, or accounts with no joint owner or named beneficiary). Often not if assets were joint or have named beneficiaries (RRSP, TFSA, life insurance).

1. First 72 hours

- ☐ Locate the original will; confirm you are the named executor
- ☐ Order 8 to 10 certified death certificates
- ☐ Arrange the funeral; secure property; forward mail
- ☐ Notify family and beneficiaries; arrange care for dependants or pets
- ☐ Apply for the CPP death benefit ($2,500) and survivor benefits

2. Notify institutions

- ☐ Banks (open an estate account), Service Canada (stop CPP and OAS), CRA, ICBC, employer, insurers, investment firms

3. Inventory the estate

- ☐ List all assets and all debts; start a transaction log

4. Give notice to beneficiaries

- ☐ Beneficiaries, intestate successors, the spouse, and anyone with a possible wills variation claim

  Wait 21 days after notice before filing.

5. Advertise for creditors

- ☐ Publish a Notice to Creditors in the BC Gazette; review claims

  Do not distribute anything until this is done.

6. File the application (BC Supreme Court)

- ☐ Application form (with or without a will)
- ☐ Affidavit of Applicant; Affidavit of Delivery; Affidavit of Assets and Liabilities
- ☐ Original will and certified death certificate
- ☐ Court filing fee $200, plus the probate fee

  Probate fee: nil under $25,000; $6 per $1,000 from $25,000 to $50,000; $14 per $1,000 above $50,000. The Grant usually issues in 3 to 6 months.

PART 2: AFTER THE GRANT (STEPS 7-11)

7. Manage the estate while waiting

- ☐ Pay ongoing costs from the estate account; protect investments; track income

8. Taxes and CRA clearance

- ☐ File the final T1 return, any missing prior returns, and a T3 if the estate earns income
- ☐ Apply for the CRA Clearance Certificate (Form TX19)

  Do not distribute until you have the certificate, or you can be personally liable.

9. Pay debts in this order

- ☐ Secured creditors; funeral costs; administration costs; tax debts; unsecured creditors. Beneficiaries last

10. Distribute to beneficiaries

- ☐ Confirm the Grant, the Clearance Certificate and that all debts are paid
- ☐ Distribute under the will (or BC intestacy rules); transfer real property at the Land Title Office
- ☐ Get a signed Receipt and Release from each beneficiary

  Beneficiaries generally cannot demand distribution in the first year after death.

11. Close the estate

- ☐ Prepare the final accounting (income, expenses, distributions) and give it to the beneficiaries
- ☐ File final documents with the court if required; keep records for 6 years

Four costly mistakes

- ☐ Distributing before paying taxes and creditors
- ☐ Skipping the creditor notice
- ☐ Not getting the CRA Clearance Certificate
- ☐ Errors in the application, which restart the court clock

Cube Law Corporation | cubelaw.ca | 15272 Croydon Drive #205, Surrey BC V3Z 0Z5

Need help obtaining the Grant? Contact us for a fixed fee quote in writing before work begins.

General information only, not legal advice. Every estate is different, and rules and fees change. Confirm current requirements. Updated November 2026.