



6062 Main Street, Niagara Falls, Ontario L2G 5Z9  
Tel: (905) 358-3513 Fax: (905) 358-6863

*The following checklist is a general guide to help you through the many duties that you, as an estate representative may be required to fulfill.*

- Locate Will and review to determine any special directions. Ascertain the whereabouts of beneficiaries.
- Assist in making funeral arrangements.
- Obtain "Funeral Director's Proof of Death Certificates" provided by the Patterson Funeral Home.
- List contents of safety deposit box.
- Arrange for safe custody of personal valuables.
- Review adequacy of property insurance and alter if necessary.
- If the deceased lived in rental property, terminate lease or arrange to sublet.
- Complete Canada Pension Plan Benefit forms, provided by the Patterson Funeral Home. Death/Survivor's Benefits will take approximately 8 weeks + to process.
- Notification/Cancellation of Old Age Security will be done by the Patterson Funeral Home. (NB The estate is entitled only to the Old Age Security cheques for the month in which the deceased died.)
- Cancel health insurance coverage and O.H.I.P.
- Cancel driver's license, monthly bills such as cable, telephone, and hydro, magazine or newspaper subscriptions, transfer of air miles. Request refunds if appropriate.
- Confirm outstanding balance and cancel credit cards.
- Request Canada Post to re-route mail. Complete form to cancel junk mail and solicitation phone calls.
- Ascertain assets and liabilities by writing to financial institutions, insurance companies, brokers, employer and RSP/RIF trustees.
- Obtain prior years' tax returns. Prepare and file any T1 returns for previous year within 5 months of the date of death.
- Locate and obtain title documents for real property, mortgages, bonds, share certificates and guaranteed investment certificates.
- Arrange valuation of real estate and other personal property.
- Send a copy of the Will to each beneficiary.
- Notify charities of any charitable bequests.
- Retain and meet with estate solicitor to complete application for probate. Make provisions for any fees that may be applicable.
- Cancellation or transfer of Good and Services Tax cheques.

## **PHONE NUMBERS FOR CANCELLATIONS OR TRANSFERS**

### INCOME SECURITY PROGRAM (CPP)

Canada Pension 1-800-277-9914

### MINISTRY OF TRANSPORTATION

Driver and Vehicle Licensing Issuing Office 905-358-5021  
12-6100 Thorold Stone Road, Niagara Falls

DEPARTMENT OF VETERANS AFFAIRS  
55 Bay Street North 9th Floor Hamilton, ON

**1-866-522-2122 (English)**  
**1-866-522-2022 (French)**

### HST CREDITS

1-800-959-1953

### CREDIT CARD CANCELLATION

#### GAS CARDS

Esso (Imperial Oil) 1-800-567-3776  
Petro Canada 1-800-668-0220  
Sunoco 1-888-622-2283  
Shell (Mastercard) 1-800-263-2263

#### MAJOR DEPARTMENT STORES

Sears 1-800-293-9082  
The Bay (HBC Credit) 1-800-387-4540  
Zellers (HBC Credit) 1-800-387-4540  
Canadian Tire 1-800-263-0471  
Home Depot 1-800-668-5336  
The Body Shop 1-866-632-0996  
Home Hardware 1-800-462-3670  
Costco 1-800-463-3783  
JC Penny 1-800-463-3783

#### MASTERCARD

Bank of Montreal 1-800-263-2263  
Customer Care for MasterCard 1-800-265-9710  
Meridian Credit Union 1-800-567-8111  
Canadian Tire MasterCard 1-800-459-6415  
HBC MasterCard 1-888-877-6262

#### VISA

CIBC 1-800-256-8580  
Laurentian Bank of Canada 1-800-522-1846  
Royal Bank 1-800-769-2512  
TD Canada Trust 1-866-672-1353  
PC Financial 1-888-872-4724  
GM Point 1-800-461-3279

#### OTHER

American Express 1-800-387-9700  
Platinum Card 1-800-263-1616  
ETR 1-888-407-0407  
CAA 1-416-221-4300  
Air Miles 1-888-247-6453  
HBC 1-800-844-8131  
Optimum 1-800-746-7737

## Contact Directory

The following is a list of individuals you may wish to include in your contact directory.

- Accountant
- Lawyer
- Car insurance broker
- Funeral Home
- Investment advisor
- Religious advisor
- Credit cards
- Reward clubs
- Movie rental
- Children
- Friends & Neighbours
- In-Laws
- Parents
- Beneficiaries
- Co-executor
- Guardian(s)
- Spouse
- Trust company
- Acupuncturist
- Chiropractor
- Medical Alert
- Optometrist
- Physician
- Podiatrist
- Condominium corporation
- Heat
- Hydro
- Landlord
- Satellite
- Veterinarian
- Bank
- Bereavement Centre
- Financial Planner
- House insurance broker
- Life insurance broker
- Affinity cards
- Department Store cards
- Health club
- Magazine subscriptions
- Extended family
- Grandchildren
- Other dependents
- Siblings
- Charity(ies)
- Executor
- Power of Attorney
- Trustee
- Witness to the Will
- Audiologist
- Dentist
- Naturopath
- Pharmacy
- Physiotherapist
- Cable provider
- Filtered water
- House alarm
- Internet provider
- Long distance carrier
- Telephone

## NEWSPAPER CARD OF THANKS

### Papers to be inserted:

Donations

Mass Cards

Flowers

Food

All Expressions of Sympathies

Hospital

Doctor

**Nurses**

Nursing Home

Fire/Paramedics

Police

Friends

Family Members

Co-Workers

Minister

**Organist**

Soloist

Other Musician

Tributes/Eulogy

Pallbearers

Caterers

Funeral Home

SIGN CARD:



**PATTERSON**  
FUNERAL HOME

*Caring For Families*  
SINCE 1911

*Grief is the mental, physical and emotional response a person experiences after a significant loss in their life. It can influence relationships within family, social circles and the workplace, as well as affect feelings about the "self". Although every person reacts differently to such a loss, the following is a list of common responses that are completely normal.*

**Physical**

Headache  
Nervousness  
Change in eating habits  
Lack of Energy  
Change in sleeping habits  
Crying  
Stomach distress  
Difficulty breathing

**Mental**

Forgetfulness  
Lack of concentration  
Short attention span  
Confusion  
Negative thoughts

**Emotional**

Shock  
Disbelief  
Sadness  
Anger  
Guilt  
Anxiety  
Fear  
Constantly talking about deceased

*After the loss of a loved one, families often find themselves with items of clothing, furniture and food that they would like to donate. When you are ready, the following information may help if you would like these items to help someone locally.*

**Goodwill Industries Niagara**

6758 Lundy's Lane  
Niagara Falls, ON  
Phone 905-357-9500

**Project Share**

4129 Stanley Ave.  
Niagara Falls, ON  
Phone 905-357-5121

**St. Vincent de Paul Society**

6557 Thorold Stone Road  
Niagara Falls, ON  
Phone 905-358-7611

**Niagara Support Services**

120 Canby St  
Port Robinson, ON  
905-384-1172

**Canadian Diabetes Association**

177 Scott Street  
St. Catharines, ON  
Phone 905-646-4843  
905-641-3500

**Hope Furniture Bank**

3531 Portage Rd. Suite 16  
Niagara Falls, ON L2J 2K4  
Phone 905-356-4673  
hopefurniturebank@yahoo.ca

**Salvation Army Family Thrift Store**

6175 Dunn St.,  
Niagara Falls, ON  
Phone 905-356-2670

**Big Brothers Big Sisters of Niagara Falls**

**“Nearly New” Store**

4311 Queen St  
Niagara Falls, ON L2E 2K9  
Phone 905-357-5454 ext. 221

## Cancel the 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. We recommend that you send the documents by registered mail to:

Passport Canada  
Foreign Affairs Canada  
Gatineau, Quebec K1A 0G3  
Canada

or by courier to:

Passport Canada  
70 Crémazie Street  
Gatineau, Quebec J8Y 3P2  
Canada

## Cancel the Social Insurance Number (SIN):

The next-of-kin should return the SIN card along with a copy of the death certificate or a Statement of Death to Service Canada. If you do not have the SIN card but do know the number, please send proof of death (as previously stated) with the SIN clearly written on it. These documents should be sent to:

Social Insurance Registration  
P.O. Box 7000  
Bathurst, New Brunswick E2A 4T1  
Canada

**CDMA – ACMD**  
Canadian Direct Marketing Association

**REGISTRATION FORM**

**The Canadian Direct Marketing Association's  
Do Not Mail/Do Not Call Service**

The Do Not Mail/Do Not Call Service is a free consumer service offered by the Canadian Direct Marketing Association (CDMA) that allows people to stop receiving unwanted offers of goods and services by mail or telephone. You can register the name of a recently deceased spouse or family member with the Do Not Mail/Do Not Call Service by filling out the form below and mailing it to CDMA

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Please complete and mail to:

Do Not Mail/Do Not Call Service  
Canadian Direct Marketing Association  
P.O. Box 706  
Don Mills, ON M3C 2T6

Person's Name: \_\_\_\_\_

Other common variations of name (such as use of middle name or initials or incorrect spellings):

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Address: \_\_\_\_\_ Apt. # \_\_\_\_\_

City: \_\_\_\_\_ Province/State: \_\_\_\_\_

Postal Code/Zip Code: \_\_\_\_\_

Phone Number: \_\_\_\_\_





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## **MEMORIAL TREE DONATION PROGRAMS**

Often we have a request from a family, that we have previously served, for help with regards to planting a tree to honour the memory of their loved one. The following information is offered to you and your family should you be interested in having a tree planted within our community. We hope you find this information helpful.

### **NIAGARA FALLS:**

For information about tree planting made available through the City of Niagara Falls, please contact Harvey Dalton or Cynthia Roberts at Fairview Cemetery at 905-354-4721.

### **NIAGARA ON THE LAKE:**

The Niagara On The Lake, Parks and Recreation Department maintain a tree fund to help with the further greening of Niagara On The Lake. This gives an opportunity for people to donate towards the planting of trees at numerous civic owned properties. Special arrangements can also be made to specifically donate a tree in memory of a loved one. Further details can be obtained by call the Parks and Recreation Department at 905-468-4261 or Niagara Lakeshore Cemetery at 905-468-2747.

## ACKNOWLEDGMENT CARDS

The following suggestions are offered with the hope that they may prove to be helpful in the use of your Acknowledgment Cards.

Our sorrow is made easier to bear through the help of friends like you. We want you to know how much we appreciate all that you have done for us during these trying hours.

During a time like this we learn how much our friends really mean to us. Your expressions of sympathy will always be treasured.

Your thoughtfulness and sympathy have been most helpful and consoling to us in our bereavement. The lovely flowers were an expression of friendship, which will always be a pleasant memory.

In our recent bereavement we found great consolation and comfort in the remembrances of our many friends. Your thoughtfulness will always remain a cherished memory.

Sympathy in the hour of sorrow is something long remembered. Your kindness has been so helpful and all that you have done for us is deeply appreciated.

Perhaps you sent a lovely card,  
Or sat quietly in a chair;  
Perhaps you sent beautiful flowers,  
If so, we saw them there.  
Perhaps you sent or spoke kind words  
As any friend could say;  
Perhaps you were not there at all  
Just thought of us that day.  
Whatever you did to console the heart  
We thank you so much, whatever the part.

The sympathy and understanding of friends like you have helped so much to lighten the burden of our sorrow. No words can express the full measure of our appreciation.

Without your sympathy and understanding our loss would have been even more difficult to bear. Our sincere appreciation accompanies this message.

Your lovely flowers were an expression of true friendship and your thoughtfulness helped to support us in our bereavement.

Friends who remember in the hour of sorrow are never forgotten. We want you to know we appreciate all that you have done.

Your thoughtfulness in our sorrow has meant so much to us. Everything you have done is truly appreciated.

When we needed you the most,  
You were there.  
Words cannot express the love  
And appreciation we wish to  
extend to you.

RELEASE OF INFORMATION

I, \_\_\_\_\_

authorize Patterson Funeral Home to provide

Kirkpatrick Monuments  Rigg Mooney Monuments

with my name and phone number for the purposes of contacting  
me for a monument inscription.

Date \_\_\_\_\_

Signature \_\_\_\_\_

Kirkpatrick Monuments  
4640 Queen St.  
Niagara Falls, ON  
L2E 2L6  
905-357-5800

Rigg Mooney Monuments  
4605 Queen St.  
Niagara Falls, ON  
L2E 2L7  
905-354-2812

Date: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Attention: Client Services  
CONFIDENTIAL

Re: Cancellation of Credit Card No. \_\_\_\_\_

\_\_\_\_\_  
(deceased's name)

To Whom It May Concern:

Enclosed is a copy of \_\_\_\_\_'s Death Certificate. As the  
Executor of \_\_\_\_\_'s estate, I request that you cancel  
\_\_\_\_\_ credit card and forward a closing statement to the address below.

If this credit card was protected by life insurance, kindly include the required forms to initiate a  
claim and if any reward programs were associated with \_\_\_\_\_'s card,  
please advise if these privileges are transferable.

Thank you for the service your company has provided to date.

If you have any questions or concerns, do not hesitate to contact me.

Sincerely,

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Date: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Attention: Client Services  
CONFIDENTIAL

Re: Cancellation of Membership/ Subscription No.

\_\_\_\_\_

\_\_\_\_\_  
(Deceased's name)

To Whom It May Concern:

Enclosed is a copy of \_\_\_\_\_'s Death Certificate. As the  
Executor of \_\_\_\_\_'s estate, I request that you cancel  
membership/ subscription immediately and forward a closing statement to the address below.

If the cancellation of these services results in a credit or refund, please advise in writing.

Thank you for the service your company has provided to date.

If you have any questions or concerns, do not hesitate to contact me.

Sincerely,

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Date: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Attention: Client Services  
CONFIDENTIAL

Re: Cancellation Account No. \_\_\_\_\_

\_\_\_\_\_  
(deceased's name)

To Whom It May Concern:

Enclosed is a copy of \_\_\_\_\_'s Death Certificate. As the  
Executor of \_\_\_\_\_'s estate, I request that you cancel all  
services immediately and forward a closing statement to the address below.

If the cancellation of these services results in a credit or refund, please advise in writing.

Thank you for the service your company has provided to date.

If you have any questions or concerns, do not hesitate to contact me.

Sincerely,

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Date: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Attention: Patient Services  
CONFIDENTIAL

Re: \_\_\_\_\_

**FILE CLOSED**

To Whom It May Concern:

Enclosed is a copy of \_\_\_\_\_'s Death Certificate. As the  
Executor of \_\_\_\_\_'s estate, I request that you cancel \_\_\_\_\_  
file with your office and forward any outstanding documentation or further correspondence to  
the address below.

Thank you for the service your office has provided to date.

If you have any questions or concerns, do not hesitate to contact me.

Sincerely,

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_