

SURVIVOR'S GENERAL GUIDE

When a member dies the survivor is left with the onerous task of closing the member's affairs. To assist a survivor/executor/executrix we have developed a list of the some of the principle activities which may require action. The list is a guide only, and must not be viewed as comprehensive.

General Guidelines

- Final personal income tax filing
- If you are not the executor or executrix for the member's estate, contact the person who is.
- Consider whether to engage a lawyer
- Inform all current or former employers where the deceased was a member of a pension or benefit plan.

Federal & Provincial Governments

The Federal Government has a central website at Service Canada (link to <http://www.servicecanada.gc.ca/en/home.shtml>)

This website will provide you with details regarding concerns such as:

- Final personal income tax filing
- Social Insurance Numbers
- Passports
- Canada Pension Plan benefits
- Old Age Security benefits
- Veterans Affairs programs & benefits
- Canada Savings Bonds
- Firearms
- Aboriginal status and programs

and more can be found

This same site provides access to information on provincial government programs and mandates related to:

- Health cards
- Car and drivers licenses
- Death certificates

To reach Service Canada by phone, from within Canada or the United States, call toll-free Monday to Friday. For callers in Canada, service is available from 8:00 a.m. to 8:00 p.m., your local time. From the United States, service is available from 8:00 a.m. to 8:00 p.m. Eastern time. 1-800-O-Canada (1-800-622-6232) For TTY service call 1-800-926-9105.

Miscellaneous

Also, as a survivor of a member, you may have to give appropriate consideration to:

- Informing insurance companies; home, car, and personal life (Insurance held on top of the Canada Post coverage).
When contacting these companies it is advisable to have the insurance policies available.
- Informing financial institutions; banks, credit unions, Caisses Populaires and credit card companies.
- Investment dealers or brokers; RRSP's, RSP's, RIF's, investment accounts, etc.
- Re-directing or holding of mail by your local Post Office.
- Informing public utility companies to make relevant name changes.
- Informing relevant organizations where the deceased:
 - Was a volunteer
 - Was a professional member
 - Was a social member
- Contacting caregivers or other health service organizations
- Cancelling memberships to magazines and other publications