

## **BEREAVEMENT A LIST OF GENTLE REMINDERS**

### **QUICK REFERENCE CHECKLIST (if applicable)** (NUMBERS LISTED MAY BE MOST APPLICABLE FOR ONTARIO RESIDENTS)

- \* Notify Old Age Security
- \* Notify Canada Pension Plan
- \* Notify Private/Foreign Pension
- \* Cancel Ontario Health Card
- \* Review Eligibility to Ontario Drug Benefits (Trillium/Co-payment)
- \* Cancel Ontario Driver's License
- \* Return Handicapped Parking Permit
- \* Notify Canada Customs and Revenue Agency - GST (Revenue Canada)
- \* Notify Child Tax Benefit
- \* Notify Workplace Safety & Insurance Board (formerly WCB)
- \* Return Citizenship Documents
- \* Return Current Passport
- \* Notify Indian Affairs or Local Band
- \* Notify Veterans Affairs
- \* Notify Canadian Firearm Centre
- \* Destroy Boating Competency Certificate
- \* Cancel Outdoors Card
- \* Notify Family Responsibility Office
- \* Update Power of Attorney (POA)
- \* Update WILL
- \* Notify all Banks/Open Estate Account
- \* Cancel Credit Cards/Bank Cards
- \* Notify Life/Health/Car Insurance
- \* Retain Social Insurance Number Card

### **Death Certificate**

The Statement of Death is completed by the Funeral Director and is forwarded to the Government of Ontario for registration.

The Funeral Director will provide you with a "Certificate of Death" which can be used as proof of death to cancel or apply for benefits. This is not a provincial death certificate.

If a provincial death certificate and/or a medical certificate of death are required, an application can be submitted to the Office of the Registrar General. It takes approximately three months for a death to be registered and a certificate cannot be issued until the process is complete. There is a fee for this certificate. Please note that the extended certificate (cause of death) will not be provided unless specifically requested when making application for the death certificate. This application is available at your local Government Information Centre, by calling the Registrar General's Office at 1-800-461-2156, or on-line at [www.ontario.ca](http://www.ontario.ca).

## **Birth Certificate**

The Provincial birth certificate can be retained by the next-of-kin or destroyed.

## **Federal Government Pensions - Canada Pension and Old Age Security**

All forms/publications/applications listed below are available at your local Government Information Centre, by calling Income Security Programs at 1-800-277-9914, or on-line at: [www.ontario.ca](http://www.ontario.ca).

The Ontario Funeral Services Association has an agreement with the Income Security Programs to fax the information regarding the deceased person in order to cancel the Old Age Security Benefits and the Canada Pension Plan Benefits promptly. However, it is advisable to also send a copy of the death certificate if you are not applying for any benefits. This will ensure that all T4 slips will be sent to the executor or next-of-kin.

Please note that the estate is entitled to the Canada Pension and the Old Age Security benefits payable to the deceased for the month of death. If payments are received following the month of death they must be returned to the Income Security office.

There may be entitlement to benefits from the Canada Pension Plan or from Old Age Security. These may include:

- \* CPP Survivor's Benefit
- \* CPP Death Benefit
- \* CPP Child Benefit
- \* Allowance for the Survivor
- \* Guaranteed Income Supplement

The staff at the Government Information Centre can assist you to complete the applicable forms.

The following documents may be required to support the applications for benefits.

- \* Birth or baptismal certificate for the deceased, the surviving spouse and the eligible children
- \* Social Insurance Number for the deceased, the surviving spouse and the eligible children
- \* Marriage certificate/Statutory Declaration of Common-Law Union
- \* Death certificate
- \* Proof of funeral expenses

If there is no WILL, a "Clarification Form" must be completed by the person

responsible for funeral expenses.

It is important to note that all photocopies of supporting documents must be certified as true copies. The staff at the Government Information Centre can assist you with this.

The maximum CPP Death Benefit is \$2,500.00

The completed applications are mailed to Human Resources and Development Canada, Income Security Programs, P.O. Bag 2013, Timmins, ON P4N 8C8.

If the deceased person was receiving a foreign pension contact International Operations in Vanier (Ottawa) at 1-800-454-8731. The Québec Pension Plan (QPP) Benefits office can be reached at 1-800-463-5185.

The Income Security Programs has some helpful publications including "Canada Pension Plan Survivor's Benefits" and "Old Age Security Program" - Spouse's Allowance and Widowed Spouse's Allowance".

### **Workplace Safety and Insurance Benefits (formerly WCB)**

If the deceased person was in receipt of benefits from the Workplace Safety and Insurance Board please notify them by calling 1-800-387-0750. Have the claim number or the social insurance number available when the call is placed

### **Driver's License and Parking Permit**

The deceased person's Ontario Driver's License must be cancelled. Your local License Issuing Office can assist you with this. In Orillia, visit the Drivers and Vehicle License Issuing Office at 150 Front St.

If the deceased person was in possession of a Handicap Parking Permit it must be returned to the License Issuing Office and it will be cancelled.

The Government Information Centre staff can assist you to complete the "Sworn Statement for the Transfer of a Used Motor Vehicle in the Province of Ontario". This sworn statement is required if there is no WILL or the WILL is not presented at the time of the transfer. The License Bureau staff will advise if this is a requirement. This form will be provided or is available at your local Government Information Centre.

### **Income Tax, GST and Child Tax Benefit**

All forms/publications/applications listed below are available at your local Government Information Centre, by calling the Form Warehouse at 1-800-959-2221, or on-line at [www.cra-arc.gc.ca](http://www.cra-arc.gc.ca).

Send a certified copy of the death certificate to Canada Customs and Revenue Agency (CCRA). This can be mailed to Canada Customs and Revenue Agency,

Sudbury Tax Centre, 1050 Notre Dame Avenue, Sudbury, ON P3A 5C1.

Your local Government Information Centre has addressed envelopes for your convenience. This will also cancel any GST that the deceased person may have been receiving. Canada Customs and Revenue Agency has a helpful information sheet called "What to Do Following a Death" (RC4111)

GST cheques received after death must be returned to Canada Customs and Revenue Agency. The estate is not entitled to these benefits. The surviving spouse may submit a request for future GST entitlement. A tax return must be submitted if the surviving spouse did not complete one upon last filing.

If the deceased person is in receipt of the Child Tax Benefit (CTB) the surviving spouse (residing at same address) can request a transfer of the benefit. No formal application is required. Guardians (including ex-spouses) must submit an application to be considered for the Child Tax Benefit.

The surviving spouse can also complete an "Election to Change Marital Status" (RC 65) form which would allow the CTB to be re-calculated and may result in a higher amount.

Canada Customs and Revenue Agency has a helpful publication called "Preparing Returns for Deceased Persons" which provides information on what is required to complete all applicable returns.

### **Health Card**

All forms/applications listed below are available at your local Government Information Centre or by calling The Ministry of Health and Long-Term Care at 1-800-664-8988, the Trillium Drug Plan at 1-800-575-5386 or the Co-payment Plan at 1-888-405-0405, or on-line at [www.health.gov.on.ca](http://www.health.gov.on.ca).

Send a certified copy of the death certificate to the Ministry of Health and Long-Term Care along with the destroyed (cut in half) health card or complete Sections A, B and F of the Change of Information form.

This can be mailed to your OHIP office nearest you. Call 1-800-664-8988 to find the office in your area. Your local Government Information Centre has addressed envelopes for your convenience.

You may wish to review your eligibility to Ontario Drug Benefits such as the Trillium Drug Plan or the Co-payment for seniors.

### **Citizenship Cards**

All citizenship documents (certificate and/or 'proof of' card) must be returned to the Canadian Citizenship and Immigration office. They can be mailed, along with a certified copy of the death certificate to P.O. Box 10000, Sydney, NS, B1P 7C1.

## **Passport**

All current passports must be returned to the Passport Office. Send a certified copy of the death certificate to: The Passport Office, Foreign Affairs and International Trade Canada, Gastineau, QC, K1A 0G3.

The cancelled passport will not be returned to you unless you make this request in writing to the Passport Office. Make this request when returning the passport.

## **Indian Status Card**

If the deceased person had Indian Status, the Department of Indian Affairs or the local band office must be notified. Send a certified copy of the death certificate, along with the destroyed (cut in half) status card to the Indian and Northern Affairs, Ottawa Ontario, K1A 0H4.

## **Social Insurance Number (SIN)**

The Social Insurance card should be retained until the estate has been finalized.

Return the Social Insurance card, along with a certified copy of a death certificate, to Service Canada, Social Insurance Registration, PO Box 7000, Bathurst, New Brunswick, E2A 4T1

## **Veterans Affairs Benefits**

If the deceased person was in receipt of benefits from Veterans Affairs Canada, please call 1-866-522-2122. Have the file number or social insurance number available when the call is placed.

There may be eligibility for assistance with funeral and burial expenses and the provision of grave markers in some cases. The Regional Office will assist you with this information.

## **Firearm License**

All Firearm License Certificates must be returned to the Canadian Firearm Centre. Certificates can be mailed, along with a certified copy of the death certificate, to Royal Canadian Mounted Police, Canadian Firearms Program, Canada Firearms Centre, Ottawa ON, K1A 0R2.

## **Boater Safety Certificate**

Proof of Competency Certificates issued for the successful completion of a Canadian Coast Guard accredited test or the boating safety course must be destroyed.

## **Outdoor Card**

The Outdoor Card must be cancelled. If the deceased had a valid Outdoors Card with three-year small game and/or three-year fishing license, the estate can apply for a refund for any unused portion of the license fees. This does not include the cost of the Outdoor Card.

Contact the Outdoors Card Centre for more information: 1-800-387-7011.

## **Power of Attorney**

The Power of Attorney Kit is available at your local Government Information Centre or by calling The Public Trustee Office at 1-800-366-0335.

It may be necessary to update your Power of Attorney (POA).

## **Land Transfer**

All Land Transfer inquiries should be directed to the Ministry of Finance at 1-800-263-7965.

## **The Family Responsibility Office (FRO)**

If the deceased person was a support payer, the Family Responsibility Office will close its file and stop all enforcement of the support obligation pursuant to Section 8(2) of the Family Responsibility and Support Arrears Enforcement Act, 1996, upon receiving the proper proof of the death. Although the Family Responsibility Office will stop enforcement of the order/agreement, the recipient may still be able to enforce the order against the estate of the payor. In addition, the recipient may have other claims against the estate of the payor, including possible claims under the Succession Law Reform Act. There may be strict time limitations for bringing a claim. A recipient may wish to consult with a lawyer to determine the options available to her/him.

FRO also needs to know if the support recipient or a child entitled to support is deceased. Each of these situations requires different steps to be taken.

In any of the above situations, please contact the Family Responsibility Office for further information. To speak to Client Services staff: call 1-800-267-4330.

Proof of the death and documents giving you the legal authority to act for the deceased person will be needed. Please call for details. Please have the seven-digit FRO case number ready, and/or the names of the payor and recipient.