

Executor & Family Estate Checklist

A calm, step-by-step guide for handling a loved one's home — with timelines, next steps, and a handoff checklist that connects directly to your RESET online booking and client portal.

You don't have to do this alone.

This checklist walks executors, family members, and next of kin through the first 12 weeks after a loved one's passing or a major life transition. Every step below can be handed off to RESET — sorting, valuation, consignment, donation, disposal, deep clean, and property preparation.

Timeline at a Glance

Phase	Timeframe	Focus
1. Immediate	Days 1–7	Notifications, documents, secure the home
2. Administrative	Weeks 2–4	Legal, financial, and estate filings
3. Sort & Value	Weeks 3–6	Inventory, keepsakes, valuables identified
4. Clear & Consign	Weeks 5–9	Consignment, auction, donation, disposal
5. Reset & Ready	Weeks 8–12	Deep clean, minor repairs, list or hand over

Phase 1 — Immediate (Days 1–7)

Priority: dignity, security, and paperwork. Nothing needs to be sorted or removed yet.

Notifications

- Obtain multiple certified copies of the death certificate (10–15 recommended).
- Notify immediate family, close friends, and employer.
- Contact funeral home or memorial provider.
- Publish obituary and coordinate service details.

Secure the Home

- Change or secure locks; take inventory of who has keys.
- Forward mail through Canada Post and cancel newspaper/subscriptions.
- Confirm home insurance is active — notify insurer of vacancy.
- Set thermostat, remove perishables, check plumbing and appliances.
- Photograph each room before anything is moved (for records and valuation).

Locate Documents

- Will, power of attorney, and any trust documents.
- Birth certificate, SIN, marriage certificate, passport.
- Bank statements, investment accounts, insurance policies.
- Property deed, mortgage papers, tax records (past 3 years).
- Digital access — passwords, phone, email, cloud storage.

Phase 2 — Administrative (Weeks 2–4)

Set up the legal and financial foundation before touching contents.

Legal

- Meet with estate lawyer to file for probate (if required in Ontario).
- Confirm executor authority in writing before signing contracts.
- Review will with beneficiaries; document any personal bequests.

Financial

- Open an estate bank account for all incoming/outgoing funds.
- Notify CRA and file final tax return; request clearance certificate.
- Contact CPP, OAS, pension providers, and life insurance.
- Cancel credit cards, memberships, utilities not needed, and subscriptions.

Property

- Confirm utilities remain on for cleanout, cleaning, and showings.
- Notify property tax office and municipality.
- If tenants or caregivers are on-site, clarify occupancy in writing.

Phase 3 — Sort & Value (Weeks 3–6)

*This is where RESET typically enters. We sort **with** the family — nothing leaves without approval.*

- Family walkthrough: identify keepsakes, sentimental items, and heirlooms.
- Distribute bequests listed in the will.
- RESET completes room-by-room inventory with photos.
- Valuables flagged: jewellery, art, antiques, coins, silver, collectibles.
- Appraisals arranged for anything over \$500 estimated value.
- AI Value Estimator used for quick triage on furniture and household goods.
- Confirm consignment vs. auction vs. donation categories with family.

Phase 4 — Clear & Consign (Weeks 5–9)

Value is recovered before anything is discarded. Every item is tracked in your Estate Dashboard.

Revenue Recovery

- Consignment items listed through RESET's partner network.
- Higher-value pieces routed to auction houses.
- Marketplace listings created for mid-value furniture and décor.
- Family reviews and approves listings via the client portal.

Donation & Disposal

- Donations coordinated with registered charities — tax receipts issued.
- Textiles, electronics, and hazardous materials routed to proper streams.
- Bulk removal booked; disposal certificates saved to the dashboard.

Phase 5 — Reset & Ready (Weeks 8–12)

The home is returned to its best possible condition — ready to list, hand over, or move into.

- Deep clean: kitchens, bathrooms, floors, windows, appliances.
- Minor repairs: paint touch-ups, drywall, fixtures, hardware.
- Curb appeal: landscaping, exterior wash, staging as needed.
- Realtor handover meeting — keys, reports, warranties.
- Final walkthrough with executor; sign-off in client portal.

Handoff Checklist — Working With RESET

Everything below is booked and tracked through your online account. Nothing is lost between phone calls or emails.

1. Book online

Choose Estate Services on resethometransitions.ca. Pick a consultation window that works — in person or virtual.

2. Free assessment

A RESET transition specialist walks the home with you, listens first, and delivers a written scope within 48 hours.

3. Portal access

You receive a private client portal login. Executor and up to 4 family members can be invited.

4. Estate Dashboard

Live inventory, photos, valuations, consignment status, donation receipts, and disposal logs — all in one place.

5. Approvals in one click

Nothing is sold, donated, or removed without your approval in the portal.

6. Statements & payouts

Consignment and auction proceeds are reconciled monthly and deposited to the estate account.

7. Final handover

Property Ready sign-off document, warranty of clean, and realtor-ready package delivered digitally.

Ready to start?

Book a free, no-pressure consultation. We'll meet you where you are — whether that's tomorrow or three months from now.

resethometransitions.ca/book • hello@resethometransitions.ca • (613) 555-0117

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