

File No.:

Benesh Bitz & Co.
ESTATE ATTENDANCE MEMO

Date:

INFORMATION

Name of Deceased:

Date of Birth:

Age at Death

SIN:

Date of Death:

Marital Status:

Spouse:

Residence at Death:

FUNERAL DIRECTORS STATEMENT OF DEATH

Name on Statement of Death

Name on Will:

Address of Funeral Director:

APPLICANT INFORMATION

Name:

Relationship to Deceased:

Phone:

Email:

Address:

WILL

Name of Witness:

Relationship to Deceased:

Phone:

Email:

Address:

PREDECEASED

Name:

Relationship to Deceased:

Date of Predeceased:

Statement of Death:

BENEFICIARIES

Name:

Relationship to Deceased:

Phone:

Email:

Address:

Name:

Relationship to Deceased:

Phone:

Email:

Address:

Name:

Relationship to Deceased:

Phone:

Email:

Address:

Name:

Relationship to Deceased:

Phone:

Email:

Address:

Name:

Relationship to Deceased:

Phone:

Email:

Address:

Name:

Relationship to Deceased:

Phone:

Email:

Address:

STATEMENT OF PROPERTY - PART I

A. REAL ESTATE

DESCRIPTION	LEGAL	LOT	BLK	PLAN	CIVIC ADDRESS	VALUE at DEATH

B. MORTGAGES

DESCRIPTION	DATED	PARTIES	TERMS	BALANCE at DEATH

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C. STOCKS and BONDS

DESCRIPTION	CERTIFICATE NO.	VALUE at DEATH

D. BANKING

NAME	BRANCH	ACCOUNT NUMBER	VALUE at DEATH

E. LIFE INSURANCE PAYABLE TO ESTATE

COMPANY	ACCOUNT NUMBER	VALUE at DEATH

F. SECURITIES

DESCRIPTION	SECURITY NUMBER	VALUE at DEATH

G. MISCELLANEAOUS (Vehicles, Jewelry, etc.)

DESCRIPTION	VALUE at DEATH
CPP	
OAS	
PENSION	

STATEMENT OF JOINT PROPERTY - PART II

A. PROPERTY HELD JOINTLY

DESCRIPTION	LEGAL	LOT	BLK	PLAN	JOINT OWNER	VALUE at DEATH

B. BANK and SECURITIES

JOINT BENEFICIARY NAME	TERMS	BALANCE at DEATH