

No Probate Letter

For Estates that didn't require Probate we need to provide additional information. The Estate's information on its assets is required to complete the clearance application

The following information is required by CRA.

All bank/investment accounts with:

- Financial Institution
- Account number
- Value at date of death
- Any additional account holder on account/Joint ownership
- What happened to the funds – cashed/transferred or distributed

Assets such as property and registered accounts (TFSA, RRSP, RIF)

- Description of the asset, including address of property or account number of registered account
- Value at date of death
- Is there a designated beneficiary or was it jointly owned?

- **Name, SIN, address and phone number of the beneficiary of any REAL asset**

- **Name of any beneficiary not specifically listed in the Will (i.e. “grandchildren”)**