Richard Kosick & Co.
T3 or Estate Tax Return Checklist

ESTATE INFORMATION

Estate name		**Date of death**	**Year end**
Spouse name		☐ **Spousal rollover**	
Executor		Email	Phone
Address		City/Prov.	Postal code
Mailing address (if different)		City/Prov.	Postal code
Lawyer		Email	Business phone
Professional Advisor		Email	Business phone
Beneficiary name	**SIN or business no.**	**Address**	**Date & amount distributed or received**
			☐ Nil
			☐ Nil
			☐ Nil
			☐ Nil
			☐ Nil

DOCUMENTS NEEDED

T1013 signed	☐ Signed ☐ No	**Tax documents summary**[1]	
Death certificate	☐ Given ☐ Pending	Prior years' tax return (3 years)	☐ Given ☐ Pending ☐ NA
Will (notarized if applicable)	☐ Given ☐ Pending ☐ NA	Tax slips	☐ Given ☐ Pending ☐ NA
Asset, liabilities, & distribution list	☐ Given ☐ Pending ☐ NA	Tax-related receipts	☐ Given ☐ Pending ☐ NA
Financial records and statements	☐ Given ☐ Pending ☐ NA	Employment-related expenses	☐ Given ☐ Pending ☐ NA
Probate document (if applicable)	☐ Given ☐ Pending ☐ NA	Business income & expenses	☐ Given ☐ Pending ☐ NA
Other:	☐ Given ☐ Pending ☐ NA	Rental income & expenses	☐ Given ☐ Pending ☐ NA

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☐ Final return	☐ Rights or things return	☐ Partner or proprietor return	☐ Estate (GRE) return
☐ Amended return	☐ Outstanding return	☐ CPP death benefit	☐ Non-resident beneficiary T2062
☐ T3 slips beneficiary	☐ T4 slips executor	☐ Clearance letter	☐ GST clearance letter

ADDITIONAL NOTES

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PRICING ☐ Quoted $__________ ☐ Based on hours spent & complexity ☐ Outstanding balance $__________

[1] See "T1 Checklist" if you want a detailed list of personal tax documents needed.