NOBARI LAW
PROFESSIONAL CORPORATION

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PROBATE INFORMATION CHECKLIST

A simple guide for Ontario estate trustees

Before you begin
Gather what you reasonably can. Not every item will apply, and you do not need to have everything before contacting Nobari Law Professional Corporation. Additional information may be requested after the estate is reviewed.

Providing this checklist does not, by itself, create a lawyer-client relationship or confirm that the firm has agreed to act. Representation begins only after any required conflict check, acceptance of the matter, and confirmation of the retainer.

1. Start With the Essentials

Please gather the following, where available:

☐ Proof of death, such as a death certificate or Funeral Director's Statement of Death.

☐ The original signed Will and any codicils, if the deceased left a Will.

☐ The proposed estate trustee's full contact information, occupation, and relationship to the deceased.

☐ The names and contact information of beneficiaries. If there is no Will, gather details of the deceased's close family members.

☐ A preliminary list of estate assets, debts, and approximate values as of the date of death.

2. Financial and Property Information

Approximate information is sufficient at this stage.

☐ Available bank, investment, mortgage, pension, insurance, and property statements.

☐ Details of real estate owned by the deceased, including the property address and how title was held, if known.

☐ Information about jointly owned assets and accounts or policies with named beneficiaries, if known.

☐ A preliminary list of known debts and estate expenses.

3. If the Deceased Left a Will

☐ The original signed Will and any Affidavit of Execution stored with it.

☐ Any original codicils.

☐ If no Affidavit of Execution is available, the names and contact information of the Will witnesses, if known.

☐ Information about any named estate trustee who has died, is unable to act, or does not wish to act.

Protect the original Will
Keep the original Will and codicils in their existing condition. Do not remove staples, separate pages, write on the documents, attach notes, or make any other changes. Nobari Law will provide instructions for delivering the originals.

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4. If the Deceased Did Not Leave a Will

☐ Information about the steps already taken to look for a Will.

☐ Details and contact information for the deceased's spouse or partner, children, and other close family members.

☐ Information about any separation, divorce, previous marriage, or domestic agreement.

☐ The names and contact information of anyone who may have an equal or prior right to apply as estate trustee.

☐ Details of any beneficiary who is under 18 or may be incapable of managing property.

Documents prepared by Nobari Law
After reviewing the estate, Nobari Law will identify the appropriate applicant and beneficiaries and prepare any required probate application documents, notices, consents, or renunciations.

5. Notes or Items You Cannot Locate

Use this space for questions, missing documents, or information that may require follow-up.

6. Sending Documents Safely

Please wait for delivery instructions
Do not send original documents, government identification, full account numbers, passwords, or other sensitive information by regular email unless Nobari Law has confirmed how the information should be provided. Original Wills and other original documents should be delivered only after you receive instructions from the firm.

7. Next Steps

Contact Nobari Law Professional Corporation to discuss the estate. You do not need to complete every item on this checklist before contacting the firm. After an initial review, we will explain what is required for the probate application and what additional information should be obtained.

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