



What To Do When Someone Dies

When someone dies there are a number of agencies, businesses and government departments you may need to contact to let them know the person is deceased. Even if the deceased was considered to be low income, many of the following resources need to be contacted and informed of the date of death.

PENSIONS/EMPLOYMENT

- **Income Security Programs Government of Canada**

Phone: 1-800-277-9914

Phone for an appointment. No walk-in service.

Main Floor, Canada Place

9700 Jasper Avenue N.W. T5J 4C2

- Includes: Old Age Security, Guaranteed Income Supplement, Allowance, Allowance for the Survivor, Canada Pension Plan (Retirement Pension, Disability Pension, Survivor's Benefit and Death Benefit);
- Give the name and Social Insurance Number of the deceased and make arrangements to take in the senior's Blue Card and other pension identification to be canceled;
- Pension payments for the month of death will be paid to the estate;
- See note under BANKS re cheques deposited directly to the bank account;
- See pages 32-33 for further information.

- **Employment Insurance:**

Phone: 1-800-206-7218

- Give the deceased person's name and Social Insurance Number.

INCOME TAX

- **Canada Revenue Agency**

9700 Jasper Avenue T5J 4C8

Phone: 1-800-959-8281 (English)

1-800-959-7383 (French)

or 1-800-665-0354 (TDD)



- **Canada Revenue Agency - continued**
 - Send or take a copy of the funeral director's death certificate with the Social Insurance Number of the deceased person written on it to the above address. This is particularly important if the person has been receiving GST credits;
 - After completing the final income tax return, complete the form requesting a Certificate of Clearance to wind up their account with this department;
 - The survivor will have to file an income tax return for the year of death for the deceased;
 - If there is income from other sources, pro-rate it to the date of death;
 - It is strongly advised that an accountant's help be obtained, particularly if the estate is considerable.

INSURANCE

If you are not sure that you have found all the life insurance policies held by the deceased, contact the organization below and have them do a policy search to locate potential life insurance coverage that may have been misplaced over time.

- **Canadian Life and Health Insurance Association**

1700-1 Queen Street East

Toronto, Ontario M5C 2X9

Phone: 1-800-268-8099 or (416) 777-2344

Fax: (416) 777-1221

Email: info@clhia.ca

Website: <http://www.clhia.ca>

FUNERAL AND COSTS

Check to see if the deceased has made pre-arrangements. If not, decide on time and place of the funeral or memorial service.

- **Memorial Society of Edmonton and District**

1108, 10235 – 124 Street, T5N 1P9

Phone: 944-0196

Website: <http://www.angelfire.com/my/edmemsociety/>

May have helped the person pre-arrange their funeral and can provide information on funeral plans;



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- **The Alberta Funeral Services Regulatory Board**

Phone: 452-6130

Website: <http://www.afsrb.ab.ca>

Fee publication Fundamentals of Funeral Planning;

- If the deceased's estate is truly unable to pay and survivors cannot meet the total costs, contact the Alberta Social Services office closest to you for assistance;
- Most funeral directors are aware of the above service and can assist survivors with the application.

CREDIT CARDS

These should be canceled with the credit card issuers and the cards should be destroyed (unless they are in the survivor's name as well).

BANKS/SAFETY DEPOSIT BOXES

The executor and/or survivor needs to notify the bank and arrange closure of accounts or updating of names on accounts.

- The bank will require a copy of the will and the funeral director's death certificate;
- If cheques were deposited directly into a bank account, the issuer may not have the correct address of the deceased and must be apprised of the person's death.

HEALTH

- **Alberta Health and Wellness**

10025 Jasper Avenue NW

Mailing address: P.O. Box 1360

Station Main

T5J 2N3

Phone: 427-1432

Toll free outside Edmonton:

Dial 310-0000, then 427-1432

- Give the Personal Health Number of the deceased; a new card will be issued to the survivor;

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- Alberta Health and Wellness will automatically notify Blue Cross of the change, but it is recommended that the survivor call them as well (see below).
- **Alberta Seniors Benefit**
10405 Jasper Avenue NW T5J 4R7
Phone: 427-7876
Toll free: 1-800-642-3853
 - Give the name and Personal Alberta Health Number or Social Insurance Number of the deceased and the date of death;
 - Alberta Seniors Benefit will arrange to have benefits cancelled;
 - Pension payments for the month of the death will be paid to the estate.
- **Alberta Blue Cross Plan**
10009 – 108 Street T5J 3C5
Phone: 498-8000
 - If the survivor is over 65, a new card will be issued. If the survivor is under 65, he/she will pay a monthly fee if they choose to continue with the service unless the survivor is on the Alberta Widow's Pension.

HOME

If the deceased's name is on the title of property or a home, as a joint tenant you will need to apply to have the title registered into the survivors name. You may want to consult with a lawyer.

TELEPHONE

If the survivor is a widow and feels it is necessary for security, her confidence or safety, the telephone may be retained in the husband's name or she may wish to use her initials.

CAR AND OTHER MOTOR VEHICLE

If a vehicle was registered in the name of the deceased, contact a Registry Agent to transfer the vehicle's ownership. The Registry Agent will need to see the vehicle registration, insurance policy and documentation that will serve as proof of the death (death Certificate and a copy of the Will). For the location of the nearest Registry agent,

call: 427-7013.

- Ensure that the name of the deceased is removed from any car insurance policies by contacting the insurance company;

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