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FINAL RETURNS

Please bring in the following forms:

Copy of the Death Certificate
Copy of the Will
Is the will in Probate?

We will need the following information:

Spouse's information (if applicable)

Personal information about the deceased:

Were they living in a retirement home or nursing home?
If yes, bring receipts for any expenses

Receipts for Medical Expenses for the last **2 years** if not previously claimed.

Did they own real estate? (Home, cottage, etc)
If yes, was it their primary residence?
If yes, Was it sold?
If yes, What year did they buy it?
When was it sold?
What was the sale price?

If it was NOT their primary residence, was it sold or transferred to a beneficiary?

If sold, What year did they buy it?
What was the purchase price?
When was it sold?
What was the sale price?

Bring receipts for expenses incurred during the purchase, sale or upkeep of the property.

Did they have stocks and bonds?
If yes, are they held in a RIF or RRSP? An open account? A TFSA account?

Please bring in last year's tax return if it was not completed at First Tax.