



<h2 style="margin: 0;">T3 Estate Tax Return Checklist</h2>
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Estate Information

Estate name	Date of death	Year end	
Spouse name	Spousal rollover		
Executor	Email	Phone	
Address			
Lawyer	Email	Business phone	
Professional Advisor	Email	Business phone	
Beneficiary name	SIN or business no.	Address	Date & amount distributed or received

DOCUMENTS NEEDED

T1013 signed	Tax documents summary
Death certificate	Prior years' tax return (3 years)
Will (notarized if applicable)	Tax slips
Asset, liabilities, & distribution list	Tax-related receipts
Financial records and statements	Employment-related expenses
Probate document (if applicable)	Business income & expenses
Other:	Rental income & expenses