

FOR IMMEDIATE RELEASE

Canadians Willing to Serve as Executors but Unprepared for the Job

Three-quarters (76%) would accept the role for a family member or close friend, though nearly nine in ten (89%) say it is a job most people are not prepared for

Toronto, Canada, October 5, 2026 – A new national poll by Canada Pulse Insights for ClearEstate finds that Canadians are willing to serve as executors even though they say it is a job most people are not prepared for: nearly nine in ten (89%) agree that being an executor can likely turn into a complicated and time-consuming job that most people are not prepared for, yet three-quarters (76%) would accept the role for a family member or close friend even if they do not fully understand what the job involves.

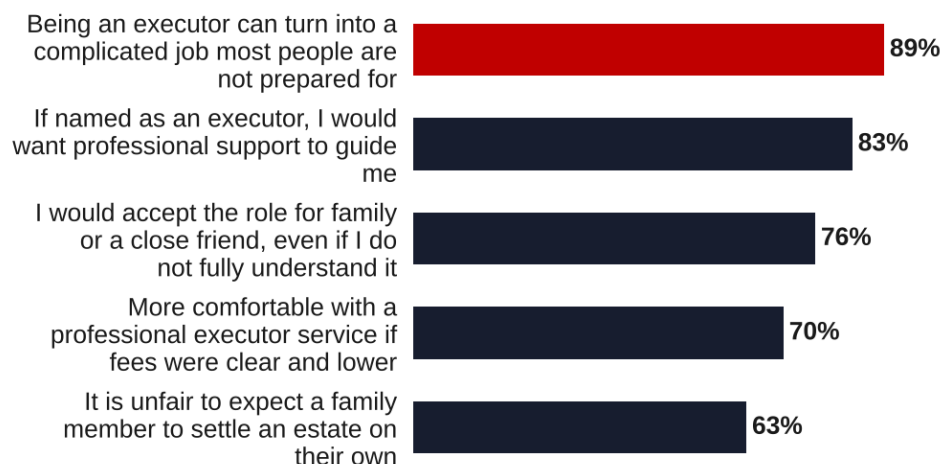
Eight in ten (82%) Canadians with a completed Estate Plan have named a family member or friend as their executor, most often because that person is the most trustworthy they know (58%). Among those who have not used a professional executor, four in ten (44%) are not sure how their executor would get access to their latest information on estate assets and liabilities after their death.

One in five (20%) Canadians have acted as an executor themselves, spending a median of 35 hours on the job. Asked whom they would appoint if they had to name an executor today, almost half (48%) would choose a family member or close friend who could hire professionals as needed, and one in five (22%) a professional-led option.

Nearly nine in ten (89%) Canadians say being an executor is a complicated job most people are not prepared for; three-quarters (76%) would still accept the role

Nearly nine in ten (89%) Canadians agree that being an executor can likely turn into a complicated and time-consuming job that most people are not prepared for, including 37% who strongly agree; 11% disagree. Those most likely to agree are women (91%); by region, the Prairies and Québec (90% each) lead, followed by British Columbia and Ontario (89% each) and Atlantic Canada (87%).

Q. The next statements are about acting as an executor for an estate. For each one, please indicate how much you agree or disagree. Percent who strongly or somewhat agree; statements abridged.

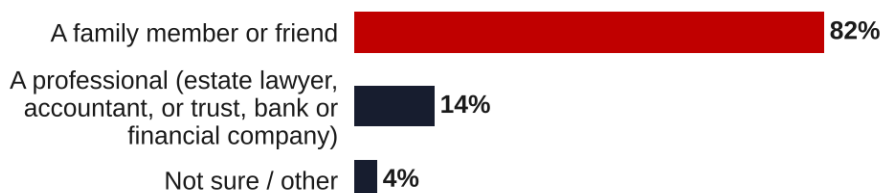


Even so, three-quarters (76%) say they would accept the role of executor for a family member or close friend even if they do not fully understand what the job involves (25% strongly agree), while one-quarter (24%) would not. Those most likely to accept the role are Canadians aged 35 to 54 (80%); by region, highest in Ontario (79%) and the Prairies (77%). Eight in ten (83%) say that if they were named as an executor they would want professional support to guide them through the process and handle most of the paperwork.

Eight in ten (82%) Canadians with a completed Estate Plan have named a family member or friend as their executor

Among Canadians with a completed Estate Plan who have not used a professional executor, eight in ten (82%) have named a family member or friend as their executor (liquidator in Québec): their children (30%), their spouse (24%), another family member (21%) or a friend (6%). About one in seven (14%) have named a professional — an estate lawyer, an accountant, or a trust, bank or financial company — and 3% are not sure. Those most likely to have named a family member or friend are Canadians aged 55 and over (89%).

Q. Who will be your estate's executor (liquidator in Québec)?



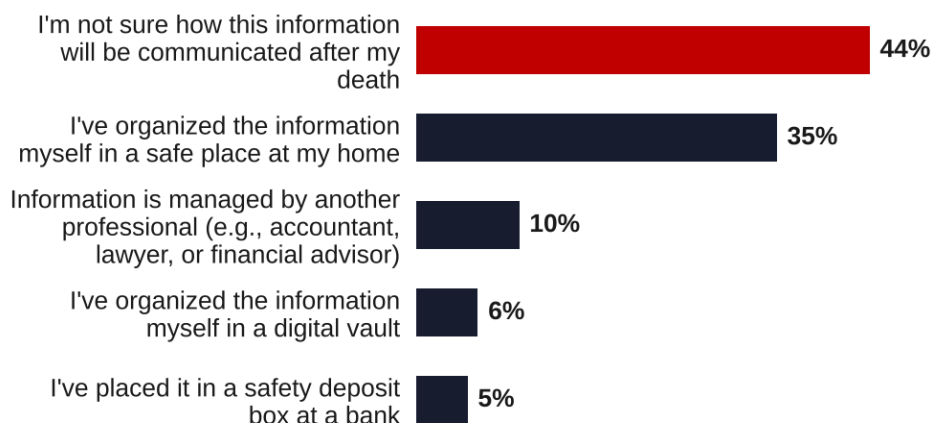
Source: Canada Pulse Insights for ClearEstate, July 14–August 18, 2026 (n=3,048). Online sample and data management by Sago.
Base: Those with a completed Estate Plan who have not used a professional executor (n=574).

Asked the primary reason for choosing a family member or friend, six in ten (58%) of those who did say that person is the most trustworthy they know. More than a quarter (26%) say their estate is simple enough for a family member to handle, 7% wanted to honour the person with the responsibility and 5% were not aware of other options. The reason does not differ significantly by age or gender.

Four in ten (44%) are not sure how their executor would access their financial information

Asked how an executor would have access to their latest information on estate assets and liabilities — accounts, house deeds, passwords — after their death, four in ten (44%) Canadians who have not used a professional executor are not sure how that information would be communicated. One-third (35%) have organized it themselves in a safe place at home, one in ten (10%) say it is managed by a professional such as an accountant, lawyer or financial advisor, 6% keep it in a digital vault and 5% in a safety deposit box at a bank. Those most likely to be unsure are Canadians aged 35 to 54 (55%), Canadians aged 18 to 34 (54%) and women (46%); by region, British Columbia (46%) leads, followed by the Prairies, Québec and Atlantic Canada (44% each) and Ontario (42%).

Q. Upon your death, how will an executor (liquidator in Québec) have access to your latest information on estate assets and liabilities (e.g., accounts, house deeds, passwords)?



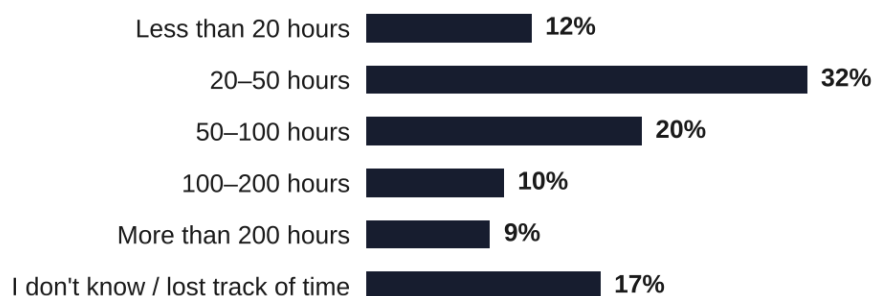
Source: Canada Pulse Insights for ClearEstate, July 14–August 18, 2026 (n=3,048). Online sample and data management by Sago. Base: All except those who have used a professional executor (n=2,971).

Nearly two-thirds (63%) of Canadians agree it is unfair to expect a family member to handle all of the legal, financial and administrative work of settling an estate on their own, while 37% disagree. Those most likely to agree are Canadians aged 18 to 34 (72%); by region, highest in Québec (69%) and British Columbia (64%).

One in five (20%) Canadians have acted as an executor, spending a median of 35 hours on the job

One in five (20%) Canadians have acted as an estate executor. Those most likely to have done so are Canadians aged 55 and over (35%) and men (23%); by region, Québec (23%) leads, followed by the Prairies (21%), Ontario (20%), British Columbia (18%) and Atlantic Canada (16%).

Q. Approximately how much total time did you personally spend on executor duties, including administration, communication, legal, and financial tasks?



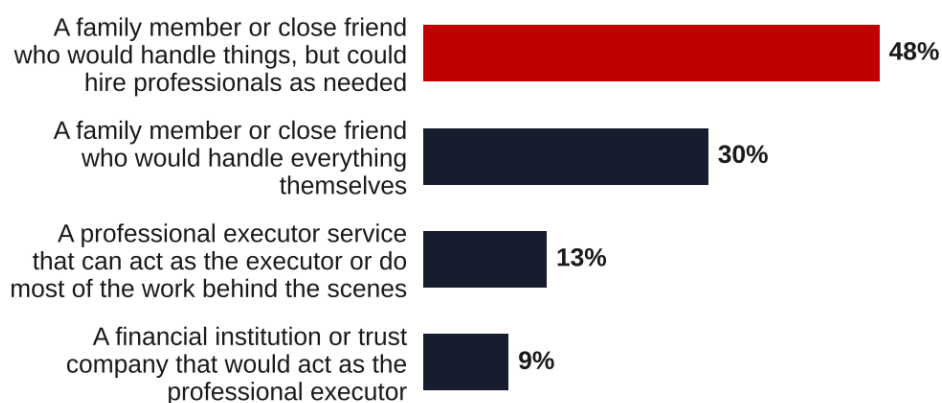
Source: Canada Pulse Insights for ClearEstate, July 14–August 18, 2026 (n=3,048). Online sample and data management by Sago. Base: Those who have acted as an executor (n=579).

Among those who have served, the median time spent on executor duties — administration, communication, legal and financial tasks — is 35 hours. One in ten (12%) spent less than 20 hours and one-third (32%) 20 to 50 hours, while nearly four in ten (39%) spent 50 hours or more: 20% spent 50 to 100 hours, 10% 100 to 200 hours and 9% more than 200 hours. Another one in six (17%) say they lost track of the time. The time spent does not differ significantly by age or gender.

Almost half (48%) would appoint a family member or friend who could hire professional help; one in five (22%) would choose a professional-led option

Asked whom they would be most likely to appoint if they had to name an executor (liquidator in Québec) today, almost half (48%) of Canadians would choose a family member or close friend who would handle things but could hire professionals such as a lawyer or accountant as needed, and three in ten (30%) a family member or close friend who would handle everything themselves. One in five (22%) would choose a professional-led option: a professional executor service (13%) or a financial institution or trust company (9%). Those most likely to choose a family member or friend who could hire professionals are Canadians aged 55 and over (54%); by region, the Prairies, Ontario and Atlantic Canada (49% each) lead, followed by British Columbia (48%) and Québec (45%).

Q. Imagine you had to appoint an executor (liquidator in Québec) for your estate today. Which ONE of the following would you be most likely to choose?



Source: Canada Pulse Insights for ClearEstate, July 14–August 18, 2026 (n=3,048). Online sample and data management by Sago.

Seven in ten (70%) Canadians say they would feel more comfortable naming a professional executor service, or using one to support their executor, if the fees were clearly explained and significantly lower than traditional options; 30% disagree. Those most likely to agree are Canadians aged 18 to 34 (80%), Canadians aged 35 to 54 (73%) and women (72%); by region, highest in Atlantic Canada (73%), Québec (72%) and British Columbia (71%). Four in ten (43%) Canadians are not familiar with professional executors at all, and another three in ten (30%) have only heard of the concept or are vaguely familiar with it.

About the study

This release covers The 2026 Canadian Wills and Estate Planning Study, conducted by Canada Pulse Insights for ClearEstate, a Canadian fintech company that offers online estate planning and estate settlement, including support for executors.

This survey was conducted with 3,048 Canadian adults by Canada Pulse Insights, fielded from July 14 to August 18, 2026. A random sample of Canadian adult respondents was invited to complete the survey through an online panel platform managed by Sago, one of the world's largest and most respected sample and panel suppliers. The data were weighted according to Statistics Canada population estimates so the sample aligns with Canada's adult population by region, age and gender. The margin of error for a comparable probability-based random sample of the same size is ± 1.8 percentage points, 19 times out of 20; it is larger for subgroups. Any discrepancies between the

detailed tables and published results are due to rounding. Respondents were given the choice to answer the survey in English or French (2,306 and 742 did so).

The question on who will be the estate's executor was asked of those with a completed Estate Plan who have not used a professional executor (n=574), and the reason for that choice of those who named a family member or friend (n=466). The question on access to estate information was asked of all except those who have used a professional executor (n=2,971). Time spent on executor duties was asked of those who have acted as an executor (n=579) and was collected in ranges; the median is the midpoint of the range in which the median respondent falls. Regional results are not reported for questions asked of fewer than 600 respondents. In this release, an executor (liquidator in Québec) is the person or professional responsible for settling an estate, and an Estate Plan is the broader set of documents and arrangements — such as powers of attorney, healthcare directives, trusts and tax planning — that accompany a Will.

Both Canada Pulse Insights and Sago are accredited members of the Canadian Research Insights Council (CRIC) and adhere to its Canadian Code of Market, Opinion, and Social Research and Data Analytics, which incorporates international ESOMAR standards and Canadian public opinion disclosure requirements.

About ClearEstate

ClearEstate is Canada's only comprehensive estate planning and settlement fintech solution. Its intuitive web-based platform provides transparent, efficient support for estate administration and executor services. Founded in 2020 and backed by investors including Diagram Ventures, OMERS Ventures, NAVentures, Investissement Québec, Canada Life and IG Wealth, ClearEstate has supported thousands of families across North America during some of life's most challenging moments.

About Canada Pulse Insights

Canada Pulse Insights is a Canadian public opinion research firm specializing in national and regional studies on public policy, media, and consumer behaviour. The firm adheres to the standards of the Canadian Research Insights Council and provides transparent reporting of methods and findings.

–30–

Media contacts:

ClearEstate

Media relations
media@clearestate.com
clearestate.com

John Wright

CEO, Canada Pulse Insights
Email: johnwright@canadapulseinsights.com
Phone: 416-700-4218
Website: CanadaPulseInsights.com

Will Daley

Senior Vice President, Research and Analytics
Canada Pulse Insights
Email: willdaley@canadapulseinsights.com
Phone: 819-431-8384