Count myAccount

2026 Tax Year

FINAL RETURN CHECKLIST

Deceased / Terminal T1 (for the Executor)

Check off everything that applies, gather those documents, and send them to us.
We guide executors through the full process. Tell us the date of death and whether any prior years are unfiled.

A THE DECEASED & ESTATE

- ☐ Deceased's SIN, full legal name, date of birth & date of death
- ☐ Executor / legal representative: name, contact, relationship
- ☐ Will, or Letters of Administration / proof of authority
- ☐ Surviving spouse: name, SIN, net income
- ☐ Direct deposit details for the estate
- ☐ Any prior years not yet filed

B INCOME TO DATE OF DEATH

- ☐ T4 – final employment income
- ☐ T4A / T4A(OAS) / T4A(P) – pension, OAS, CPP
- ☐ T4RSP / T4RIF – RRSP / RRIF (value at death)
- ☐ T5 / T3 – investment & trust income to date of death
- ☐ CPP death benefit (T4A(P)) – may be estate income
- ☐ Investment & property values at death (for deemed disposition)

C DEDUCTIONS, CREDITS & ESTATE

- ☐ Medical expenses (24-month window may apply)
- ☐ Charitable donations (final return + estate)
- ☐ Rights or Things return – optional second return (we'll advise)
- ☐ Capital property cost / ACB records (for gains at death)
- ☐ Clearance Certificate (TX19) – we request after filing

D SIGN & RETURN – we send these to you

- ☐ CMA-IND-101 Intake Form – completed & signed by executor
- ☐ Privacy Policy – signed
- ☐ Representative authorization for the deceased (RC552 / AUT-01)