

**EXECUTOR ASSISTANCE**

CASE SCENARIO:

* Lorna’s husband recently passed away after a brief and courageous battle with pancreatic cancer
* Lorna approached Trusted Legacy as she was grieving and needed some assistance with dealing her husband’s estate and wasn’t sure where to begin

SOLUTION:

We booked a couple of hours to go see Lorna at home where we could go through Peter’s wallet and other identification.

We made calls with Lorna to all credit card companies, points and loyalty cards, employer and pension contacts, Canada Revenue Agency, Service Canada, utility companies etc. We obtained information and took notes of all details that each company required to be sent to close or transfer the associated account.

Trusted Legacy took the information and drafted the appropriate letters for Lorna to sign. We went to see Lorna one more time to obtain her signature on the drafted letters and mailed/delivered all letters on her behalf.

This was a huge relief for Lorna who was grief-stricken due to the unexpected death of her loved one especially since she was not typically the one who deal with bill payments, taxes etc.

We also undertook to review Lorna’s estate plan to ensure it still accurately reflected her wishes given Peter’s passing. We ensured that all beneficiary designations were updated with her financial advisors as well.