

Probate Pitfall Prevention Checklist

Avoid delays. Prevent conflict. Close the estate with confidence.


This visual guide helps BC families avoid the 7 most common probate mistakes — and know when to call for legal help.

Prepared by Tim Louis & Company, Estate Lawyers in Vancouver

Visit us at: <https://timlouislaw.com>

7-Point Probate Mistake Detector

Answer “Yes” or “No” to the questions below:

- ☐ Do you have a valid, signed will prepared under BC law?
 - ☐ Was an executor named—and an alternate—who is still living and willing?
 - ☐ Have you gathered all financial documents, debts, and insurance info?
 - ☐ Do you understand whether probate will be required based on the estate?
 - ☐ Are there any potential disputes or excluded family members?
 - ☐ Do you know the steps for applying for probate in BC?
 - ☐ Have you spoken to a probate lawyer or reviewed the CRA tax requirements?
-  If you answered “No” to 2 or more, consider consulting a probate lawyer.

CRA Probate Tax Filing Tracker

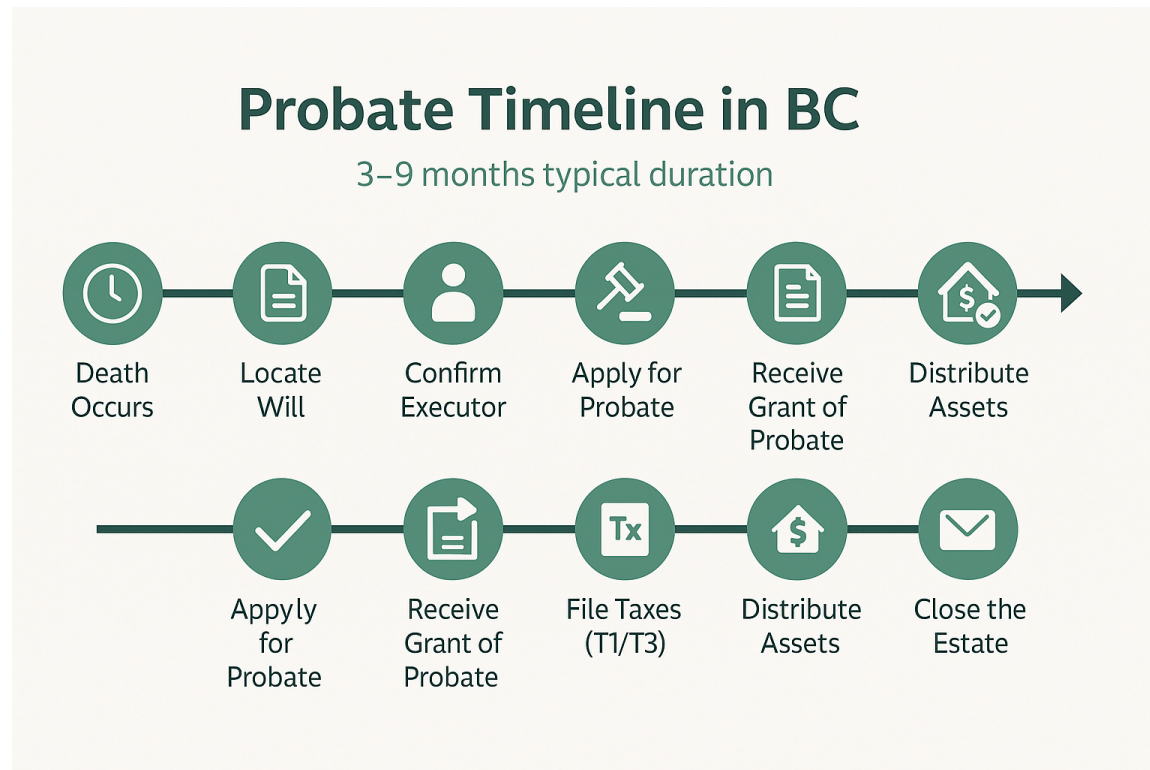
Track what you’ve filed and what remains:

- ☐ T1 Final Return – Income from Jan 1 to date of death
- ☐ T3 Trust Return – For income earned by the estate
- ☐ CRA Clearance Certificate – Needed before distributing assets

Probate Timeline in BC

Typical duration: 3–9 months

See the accompanying graphic for visual reference.




Executor Duties at a Glance

- ✓ Locate and file the will
- ✓ Identify and secure all assets
- ✓ Pay debts and taxes
- ✓ Notify beneficiaries
- ✓ Keep clear records and submit reports
- ✓ Avoid personal liability by following the correct process
- ✓ Distribute estate according to the will

Need Guidance? We're Here to Help.

Tim Louis & Company has helped BC families navigate probate and estate planning for over 40 years.

 Call: (604) 732-7678

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✓ Book your free consultation today.

✓ Visit our blog for more helpful resources.