



P & D ACCOUNTING SERVICES LTD  
SINCE 1998

1086 Northmount Drive NW  
Calgary, Alberta  
T2L 0C2  
403.284.1495

www.pdaccounting.com

**DECEASED INFORMATION:**

Name: \_\_\_\_\_

SIN: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Date of Death : \_\_\_\_\_

**EXECUTOR INFORMATION:**

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Relationship: \_\_\_\_\_

Phone: \_\_\_\_\_

Email Address: \_\_\_\_\_

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Relationship: \_\_\_\_\_

Phone: \_\_\_\_\_

Email Address: \_\_\_\_\_

---

What is your preferred method of communication (check one):	Email	Phone	
How would you like to receive completed return(s) (check one):	PDF	Paper	Both
Do you have access to <b>your</b> CRA MyAccount?	Yes	No	
Have you gained access to the deceased's CRA Account as a Representative	Yes	No	
Have you added P&D Accounting Services as a Level 2 Representative?	Yes	No	

Please provide copies of:

- Will
- Death Certificate
- Probate (if applicable)
- Names, addresses and SINS of listed beneficiaries

Did the deceased own property?

Principal residence	Yes	No
Rental property	Yes	No
Recreational property	Yes	No

Which year(s) are you filing tax returns for:

