



The
great
estate

Executor's Estate Clear-out Checklist

A practical, step-by-step checklist for executors organizing, sorting, and clearing a property. Designed to protect the estate, reduce conflict, and keep the work moving.

Note: This checklist provides general information only and is not legal advice. If the estate is contested or high-value, consult a Canadian estates lawyer or licensed professional.

Suggested Timeline (Typical)

When	Focus	Key Outputs
Day 1-3	Secure & document	Locks/keys, safety check, full photo set, staging zones, set aside valuables & documents
Week 1	Inventory & authority	Document collection, room inventory, insurer notification, confirm legal authority
Weeks 2-4	Sort & value review	Category sorting, family review window, appraisals/auction intake as needed
Weeks 4-6	Disposition & clean	Sell/donate/dispose, hauling, repairs if required, deep clean, final walkthrough

1) Authority to Act (Before You Clear, Sell, or Distribute)

- ☐ Locate and secure the most recent Will and any codicils. Store originals safely.
- ☐ Confirm who is appointed executor (estate trustee); identify any alternate executor(s).
- ☐ Order death certificates (multiple originals may be required for banks, insurers, and government agencies).
- ☐ Identify your legal authority status: Grant of Probate, Letters of Administration, or other confirmation from legal counsel or the court. If unclear, pause on selling or distributing valuables.
- ☐ Create an executor file system (binder and secure cloud folder) and a simple tracking sheet for decisions, expenses, and receipts.
- ☐ Notify the **property insurer** and confirm requirements for **vacant home coverage**.

2) Initial Property Assessment (Day 1-3)

- ☐ Secure the home: collect keys, change or confirm locks, set alarms, and control access.
- ☐ Photo or video every room **before moving items**. Capture closets, drawers, garage, storage areas, and exterior.
- ☐ Identify immediate risks: leaks, mould, pests, unsafe wiring, spoiled food, sharps or medications, and trip hazards.
- ☐ Pull and set aside high-risk items: **cash, jewelry, passports, IDs, titles, financial statements, and sentimental items**.
- ☐ Create staging zones (tape or labels): **Keep, Family Review, Sell, Donate, Dispose, Documents**.
- ☐ Record meter readings and note utility status (heat, water shut-off, electricity, internet, security).



3) Documentation and Inventory (Ongoing)

- ☐ Start a **room-by-room inventory** (item, condition, estimated value, disposition, recipient, photos).
- ☐ Gather key documents: **property tax**, mortgage, **strata or condominium rules**, insurance, vehicle ownership, warranties, manuals.
- ☐ Locate keys and access: mail key, storage locker, safe or safety deposit box information, garage remotes, password list.
- ☐ Keep all executor expenses and receipts (mileage, bins, locksmith, cleaning, hauling, storage).
- ☐ Track donations with receipts when available; record charity name, date, and high-value items donated.
- ☐ Consider engaging an **estate clear-out or professional organizing service** to assist with documentation, sorting, organizing, and dispersal.

4) Sorting and Categorization (Week 1–3)

- ☐ Set family ground rules early: one decision-maker, deadlines for pickup, and how disputes are resolved.
- ☐ Sort by **category first**, then by room (prevents re-sorting). Label boxes clearly and keep categories separate.
- ☐ Create a **documents triage**: legal/estate, financial, tax, property, medical, personal, shred.
- ☐ Hold a **family review window** for sentimental items; photograph items that may be claimed later.
- ☐ Maintain **chain of custody** for valuables (who removed the item, where it is stored, when it was transferred).

5) Valuable Item Identification (Before Selling or Donating)

- ☐ Look for **value items**: fine jewelry, coins, art, antiques, designer goods, collections, tools, instruments, vintage electronics, vehicles.
- ☐ If value items exist, obtain a second opinion from a **qualified appraiser, auction house, or specialist consignment partner**.
- ☐ Avoid deep cleaning, repairs, or restoration until items are valued (this can reduce value).
- ☐ Document every sale: item, buyer, date, amount, payment method, and where funds were deposited (**estate account**).

6) Donation and Disposal Planning (Week 2–4)

- ☐ Choose donation partners and confirm what they accept; schedule pickups or drop-offs.
- ☐ Separate **regulated or hazardous items**: paint, propane, chemicals, batteries, e-waste, sharps or medications (use **municipal or provincial approved disposal programs**).
- ☐ Shred sensitive documents (IDs, statements, medical records).
- ☐ Plan for removal: charity pickup, recycling run, junk hauling, and final landfill trip—book early for larger volumes.
- ☐ Consider storage only if needed to protect valuables or stage the home for listing.

7) Final Walkthrough and Handover (Last 48 Hours)

- ☐ Empty every space: drawers, closets, attic, crawlspace, garage, sheds, and patio storage.
- ☐ Remove wall hangings and items required by the realtor or buyer; patch small holes if appropriate.
- ☐ Complete cleaning: floors, appliances, bathrooms, windows, odour control; schedule a deep clean if listing.
- ☐ Confirm utilities plan (minimum heat, water off/on, mail forwarding, garbage pickup).
- ☐ Take final photos, confirm key handover, and keep a record of who received keys and when.

When to Pause and Get Professional Help

- ☐ The Will is missing or disputed, or there are competing executors or heirs.
- ☐ The estate includes high-value collections or suspected stolen goods.
- ☐ The home has hoarding, biohazard conditions, significant damage, or safety risks.
- ☐ There are tenants or occupants, or unclear ownership or strata restrictions.
- ☐ Consider engaging an **estate clear-out or professional organizing service** to assist with documentation, sorting, organizing, and dispersal.

