

Clearance Certificate Checklist

Please note that we do these in June after the tax season has ended

We require:

- Copy of the will
 - List of assets and their values at the date of death with supporting documentation
 - o If the estate went through probate than the probate documents will have all this information
 - List of the disbursements made per the will (to the beneficiaries)
 - o Please include the date, the names of who the money went to, and the amount of the payment
 - o We also need proof of these payments if possible
 - The value of the estate bank account at the time of the clearance certificate application
-