When a Client Dies

If a client dies while the Public Guardian and Trustee (PGT) is committee of estate, all of the client's assets become part of the client's estate. The client's will, or the provincial intestacy rules if the client dies without a will, determine how the assets are distributed. Assets are transferred to the client's executor or administrator who is responsible for distributing the estate assets to the deceased's beneficiaries or intestate successors. Until the assets are transferred, the PGT will safeguard the assets and continue to collect the client's income.

Initial steps

PGT staff will:

- obtain a death certificate;
- notify all income sources, creditors and Canada Revenue Agency;
- attempt to locate the executor or next of kin qualified to administer the estate;
- provide information on estate assets to the executor or next of kin to make an application to the court to administer the estate;
- review PGT management of the client's finances, including a fee review.

Funeral arrangements

A client's family members are encouraged to consult with the PGT case manager when making funeral arrangements. When there is no executor or family member, the case manager may make funeral arrangements.

Transfer of estate

The PGT requires a copy of the representation grant issued by the court which authorizes the executor or administrator to receive the estate funds. The PGT requests that a release be signed by the executor or administrator. For low asset estates, a representation grant may not be required. Speak to PGT staff for more information.

PGT legal authority during transition

The PGT continues with the authority as committee of estate even after the death of a client until a representation grant is issued appointing an executor or administrator. However, the exercise of this authority is limited. During this period, the Estate Liaison department conducts the day to day management associated with maintaining and preserving the estate's assets.

When an executor or next of kin cannot be located

The PGT Estate and Personal Trust Services administers estates of persons in BC who die with or without a will when an executor, family member or other eligible person either does not wish to or is unable to carry out the administration of the estate. When a client dies while the PGT is committee, the Estate Liaison department will either refer the estate to Estate and Personal Trust Services or to the BC Unclaimed Property Society. If client assets have been transferred to the BC Unclaimed Property Society, a claimant should contact them directly at toll free at 1.888.662.2877 or info@bcunclaimedproperty.bc.ca.