

# Estate settlement requirements

There are a variety of documents required to settle a death claim, depending on the product and plan type and with or without a named beneficiary. The list below is not exhaustive, and may be expanded for complex accounts.

iA Private Wealth	Insurance company
Registered and non-registered plans	Life insurance & investments products
<p>All plans:</p> <ul style="list-style-type: none"><li>• Death certificate</li><li>• Letter of direction</li><li>• Banking information</li></ul> <p>Plan with named beneficiary:</p> <ul style="list-style-type: none"><li>• Verification of beneficiary identity</li></ul> <p>Plan without named beneficiary:</p> <ul style="list-style-type: none"><li>• Probated Will, or</li><li>• Appointment of estate trustee, if no Will</li><li>• Verification of executor identity</li></ul>	<p>All products:</p> <ul style="list-style-type: none"><li>• Death certificate</li><li>• Claimant's statement</li><li>• Banking information</li></ul> <p>Product with named beneficiary:</p> <ul style="list-style-type: none"><li>• Verification of beneficiary identity</li></ul> <p>Product without named beneficiary:</p> <ul style="list-style-type: none"><li>• Will (value up to \$50,000)</li><li>• Probated Will (value over \$50,000)</li><li>• Verification of executor identity</li></ul>

Once necessary documentation is received, settlement typically takes place within ten to fifteen business days.

**If you have any questions, please speak with a member of our wealth management team.**