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
All plans:Death certificateLetter of directionBanking information	All products:Death certificateClaimant's statementBanking information
Plan with named beneficiary:Verification of beneficiary identity	Product with named beneficiary:Verification of beneficiary identity
 Plan without named beneficiary: Probated Will, or Appointment of estate trustee, if no Will Verification of executor identity 	 Product without named beneficiary: Will (value up to \$50,000) Probated Will (value over \$50,000) Verification of executor identity

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.





Insurance products are provided through iA Private Wealth Insurance, which is a trade name of PPI Management Inc. Only products and services offered through iA Private Wealth Inc. are covered by the Canadian Investor Protection Fund. iA Private Wealth Inc. is a member of the Canadian Investor Protection Fund and the Canadian Investment Regulatory Organization. iA Private Wealth is a trademark and business name under which iA Private Wealth Inc. operates.