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LYNCH

& ASSOCIATES

FORENSIC ACCOUNTANTS

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INFORMATION CHECKLIST FOR FATALITY CASES

(Deceased – Employed)

Deceased's Personal Information

- Name and sex
- Date of birth
- Date and type of incident
- Health status, before and after the accident
- Family background
- Resume

Surviving Spouse's Information

- Name and sex
- Date of birth
- Employment history and earning information
- Career plans before and after the incident

Dependent Children's Personal Information

- Name and sex
- Date of birth
- Detail reason why older children are dependent (i.e. college students, disabled, etc.)

Deceased's Financial Information

- Income tax returns for at least 5 years prior to the incident
- T-4 slips

Deceased's Employment Information:

- Employment status (full-time, part-time, permanent, casual, contract, temporary)
- Hours of work per week and weeks of work per year
- Base salary/wages including any overtime or bonuses (pay records, hours worked at regular rate and overtime rate)
- If unionized, please provide collective agreements

Deceased's Employee Benefit Plans

- A copy of the employee group benefits booklet
- Has the group benefits coverage for the surviving spouse and dependent children ceased following the incident?
- Most recent pension statement and termination statement of the Deceased's Pension/Retirement Savings plans
- Was the Deceased in receipt of a pension under any pension plans? If yes, please provide the amount and type of the Deceased's pension benefit
- Is a survivor pension payable to the surviving spouse? If yes, please provide details

Collateral Benefits Received

- Details of post incident collateral and lump sum benefits have been received

Household Services and other dependency losses

- Please provide a report or assumptions detailing the value of household and other services foregone by the surviving spouse and/or dependent children, including housekeeping, home maintenance, shopping, childcare and related services, etc.

Additional information

- Details of financial impact of the incident on spouse and/or dependent children
- Date of trial, mediation or anticipated Settlement