

# McKeating Actuarial Services, Inc.

www.mckeating-actuarial.com

## Economic Loss Checklist for Fatalities

We are accustomed to working with incomplete or imperfect information. Please start by sending the information that is **easily available**. We'll review it and advise if anything further is required. In general, here's what's needed:

### General Information

- Name of the deceased, the surviving spouse/plaintiff, and the defendant (for conflict of interest check)
- Names of any dependent children
- Date of birth of the deceased, the surviving spouse, and the dependent children
- Date of death
- Cause of death (MVA, medical malpractice, etc.)
- Preferred valuation date (date of trial, mediation, or settlement conference if scheduled, or is an arbitrary date acceptable?)
- Family information (Who lived in the deceased's household at the time of death? Any support obligations to a former spouse or to other family members?)
- If the surviving spouse has a new spouse, that individual's name, date of birth, and occupation
- Which heads of damages being claimed? Lost financial support/dependency? Valuable household services? Investment Management Expenses? Past and future, or future only? Include provision for income tax gross-up?

### Pre-death Earnings Information

- Income Tax Summaries, T4s, or other earnings data for the 4-5 years prior to the date of death (including the year of death) for both the deceased and the surviving spouse
- Income Tax Summaries, T4s, or other earnings data for the past 3-4 years for the surviving spouse's new spouse (if applicable)
- Copy of the regular annual pension statement for the year-end immediately prior to the date of death
- If the deceased was a student at the time of death, information about grades, career aspirations, etc.

### Post-death Earnings Information

- Income Tax Summaries, T4s, or other earnings data in respect of the surviving spouse for all years from the date of death to the current date (include information about employment income, EI benefits, Social Assistance, CPP survivor benefits, etc. as applicable)

### Reports from Other Experts

- Lost valuable services assessment, etc.

Questions? Please contact us:

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