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| INFORMATION FORM: Application for Certificate of Appointment of Estate Trustee |
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| Filer Information |
| Name of filer: |       | Law firm *(if applicable)* |       |
| Address: |       | City: |       | Province: |       | Postal code: |       |
| Email address: |       | Phone number: |       |
|  |
| Information about the deceased |
| Deceased's name: |       | Date of death: |       |
| Deceased’s address: |       | City/Town: |       | Postal code: |       |
| The application is being filed with the Superior Court of Justice in  | (choose court) |
|  |
| Documents being filed with this application in PDF: *(check all that apply)* |
| [ ]  | Application for Certificate of Appointment of Estate Trustee *(or for succeeding estate trustee, estate trustee during litigation, confirmation by resealing of appointment or ancillary appointment)* |
|  | (form) |
| [ ]  | Affidavit of Service with a Notice of Application attached and marked as exhibit 'A'  |
| [ ]  | Draft Certificate of Appointment of Estate Trustee *(or for succeeding estate trustee, estate trustee during litigation, confirmation by resealing of appointment or ancillary appointment)* |
|  | (form) |
| [ ]  | Notarial copy of Death Certificate (from Registrar General or funeral director) or court order declaring that the person has died |
| [ ]  | Consents to the Application (from majority of beneficiaries) |
| [ ]  | Draft order: | [ ]  | Dispense with bond | [ ]  | Defer taxes | [ ]  | Other: |       |
| [ ]  | For a request to dispense with a bond: | [ ]  | Applicant's affidavit | [ ]  | Consents of beneficiaries |
| [ ]  | For an order under s. 4(1) of the *Estate Administration Tax Act*: | [ ]  | Applicant's affidavit |
| [ ]  | Applicant's affidavit and undertaking pursuant to s. 4(3) of the *Estate Administration Tax Act* |
| [ ]  | Other: |       |
| **In addition, for applications with a Will:** *(check all that apply)* |
| [ ]  | Renunciation (from an estate trustee named in the will or a person who is entitled to apply) |
| [ ]  | Affidavit of Condition of Will or Codicil |
| [ ]  | Affidavit Attesting to the Handwriting and Signature of a Holograph Will or Codicil |
| [ ]  | Affidavit of Execution of Will |
| [ ]  | Copy of will and/or codicil(s) marked as exhibits to the application *(the original will/codicil must be sent to the court)* |
| Information about the application |
| [ ]  | Was a paper application and/or supporting documents filed or submitted to the court prior to October 6, 2020? |
|  | If yes, please indicate the date filed/submitted |       | *(date)* and method: |
|  | [ ]  | mail | [ ]  | courier | [ ]  | in person. |
| [ ]  | Was a court file number assigned for this application? If yes, please indicate court file number: |       |
| [ ]  | The original documents and certified copies (i.e. Will, Codicil, Bond, Ancillary Certificate etc.) were sent/delivered to the above-noted court office by: |
|  | [ ]  | mail | [ ]  | courier | [ ]  | in person on *(date)* |       | . |
| [ ]  | The estate is valued in the application at $ |       | , and the estate administration tax payable is |
|  | $ |       | , consistent with the [Estate Administration Tax Calculator](https://www.attorneygeneral.jus.gov.on.ca/english/estates/calculate.php) amount. |
| [ ]  | The estate administration tax, payable to "Minister of Finance", paid by |
|  | [ ]  | certified cheque | [ ]  | bank draft | [ ]  | solicitor's cheque, was sent/delivered to the above-noted court office |
|  | by | [ ]  | mail | [ ]  | courier | [ ]  | in person on *(date)* |       | . |

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| [ ]  | *For Applications for a Certificate of Succeeding Estate Trustee or a Certificate of Estate Trustee during Litigation,* |
|  | the fee of $130 will be paid by | [ ]  | certified cheque | [ ]  | bank draft | [ ]  | solicitor's cheque, was sent/ |
|  | delivered to the above-noted court office by | [ ]  | mail | [ ]  | courier | [ ]  | in person on *(date)* |
|  |       | . |
| [ ]  | I am requesting the deferral of the tax payment and I have included an affidavit in support of the request and a draft order. |
| I confirm/agree that: |
| [ ]  | If requested by the Registrar, I will provide a paper copy of any document that I submitted by email within the timeline requested by the Registrar. |
| [ ]  | I will receive communications and documents with respect to this proceeding by email, including an issued Certificate of Appointment of Estate Trustee, court orders or endorsements. |
| [ ]  | Documents that I am resubmitting by email will be relied upon by court staff rather than any earlier paper document submissions. |
| [ ]  | The names of the deceased/trustee/beneficiaries in each document are exactly the same as stated in the will/codicil, or "also known as" names are indicated on all documents. If not, provide the reason: |
|  |       |
| [ ]  | All of the documents that I am submitting contain the same date of death and same date of Will/Codicil *(if applicable)*. |
| [ ]  | The estate court forms used for this application are the forms currently authorized by the *Rules of Civil Procedure*. *(current forms are available at* [*www.ontariocourtforms.on.ca*](http://www.ontariocourtforms.on.ca)*)* |
| **For more information visit the Ministry of the Attorney General website at:** |
| <https://www.attorneygeneral.jus.gov.on.ca/english/estates/how_to_apply_for_probate.php> |
| <https://www.attorneygeneral.jus.gov.on.ca/english/estates/avoiding_common_errors.html> |