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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: | | | | | | | | | | | | | | | |  | | | | | | | | |
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| 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) | | | | | | | | | | | | | | | | | | | | | | | | | | |
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| 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> | | | | | | | | | | | | | | |