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| INFORMATION FORM: Application for Estate Certificate (Probate) | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
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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 Application for a Small Estate Certificate or an Amended Small Estate Certificate *(or for succeeding estate trustee, estate trustee during litigation, confirmation by resealing of appointment or ancillary appointment)* | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|  | (form) | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|  | An Affidavit of Service is being filed in support of an Application for a Certificate of Appointment of Estate Trustee | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|  | A Request to file Application (Form 74.1B) is being filed in support of an Application for a Small Estate Certificate or an Amended Small Estate Certificate: | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|  | Draft Certificate of Appointment of Estate Trustee, Draft Small Estate Certificate or Amended Small Estate Certificate *(or draft certificate 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; this is not required for Applications for a Small Estate Certificate or an Amended Small Estate Certificate) | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|  | Draft order: | | | | | | | | | | | | | | |  | | Dispense with bond | | | | | | | | | | | | | | | | | |  | | | | Defer taxes | | | | | | | | | | | | | |  | | Other: | | | | | |  | | | | | | | | | | | | | | | | | |
|  | In support of a request to dispense with a bond: | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |  | | Applicant's affidavit | | | | | | | | | | | | | | | | | | | | | |  | Consents of beneficiaries | | | | | | | | | | | | |
|  | In support of a request for an order under s. 4(1) of the *Estate Administration Tax Act*: | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |  | | | Applicant's affidavit | | | | | |
|  | Applicant's undertaking pursuant to s. 4(3) of the *Estate Administration Tax Act* | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|  | Renunciation from an estate trustee named in the Will or a person who is entitled to apply (this is not required for Applications for a Small Estate Certificate or an Amended Small Estate Certificate) | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|  | Other: | | | | | | |  | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| **In addition, for applications with a Will:** *(check all that 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) *(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? | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|  | 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)* | | | | | | | | | | | | | | | | | |  | | | | | | | | | | | | | | | | | | | | | . | | |
|  | | *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. | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|  | | **Please attach a copy of this form to any documents/payments that you send to the court by mail, courier or in person.** | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 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, Small Estate Certificate or an Amended Small Estate Certificate, 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 (select only if applicable). | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|  | | 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: | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
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|  | | All of the documents that I am submitting contain the same date of death and the same date of the 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> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |