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| INFORMATION FORM: Application for Estate Certificate (Probate) | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|  | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1. Filer Information | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Name of filer: | | | |  | | | | | | | | Law firm *(if applicable)* | | | | | | | | |  | | | | | | | | | |
| Address: | | |  | | | | | | | | City: |  | | | | | | | Province: | | | | |  | | Postal code: | | |  | |
| Email address: | | | | |  | | | | | | | | | | | Phone number: | | | | | | |  | | | | | | | |
|  | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 2. Information about the deceased and court location | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Deceased's name: | | | | | |  | | | | | | | | | | | | Date of death: | | | | | | | [Click to enter a date] | | | | | |
| Deceased’s address: | | | | | | |  | | | | | | City/Town: | | | | | | |  | | | | | | | | Postal code: | |  |
| The application is being filed with the Superior Court of Justice in: | | | | | | | | | | | | | | [select application type from this dropdown list] | | | | | | | | | | | | | | | | |
|  | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 3. Individual documents being filed with this application in PDF: *(check all that apply)* | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|  | | Application:[click here and select application type from this dropdown list] | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|  | | Draft Certificate: [click here and select application type from this dropdown list], with a copy of the will, if any, including any codicils, attached to it | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|  | | Notarial copy of Death Certificate (from Registrar General or funeral director) or court order declaring person died | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| *For an Application for Certificate of Appointment or Confirmation of Appointment of Estate Trustee (****Form 74A or 74J****):* | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| An Affidavit of Service (Form 74B) or Lawyer’s Certificate of Service (Form 74B.1)  Renunciation from estate trustee named in the Will or other person entitled to apply (Form 74G)  Consents to the Application (from beneficiaries who together have a majority interest in the value of estate assets) (Form 74H) | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| *For an Application for a Small Estate Certificate or Amended Small Estate Certificate (****Form 74.1A or 74.1E****):* | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|  | | A Request to file Application (Form 74.1B) | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| *For an Application for Certificate of Appointment with a Will (****Form 74A, 74J, and 74.1A****):* | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|  | | Copy of Will and/or Codicil(s) *(the original Will/Codicil must be sent to the court)* | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|  | | Affidavit of Execution of Will or Codicil (Form 74D or 74.8 if executed before Jan 1, 2022) | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|  | | Affidavit of Condition of Will or Codicil (Form 74E or 74.10 if executed before January 1, 2022) | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|  | | Affidavit Attesting to the Handwriting and Signature of a Holograph Will or Codicil (Form 74F), if required | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| *For an Application for a Certificate of Appointment or Confirmation of Appointment of Estate Trustee (****Form 74J****):* | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|  | | A certified copy of the foreign grant under the seal of the court that granted it (*the original certified copy must be sent to the court*)  A nomination (Form 74K) of the applicant by the estate trustee appointed in the foreign jurisdiction | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| *For an Application seeking a judge’s order (****Form 74A, 74J, and 74.1A****):* | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|  | | Draft order (Form 74I)  to dispense with bond | | | | | |  | | Draft order (Form 74I)  to defer tax payment | | | | |  | | Draft order (Form 74I)  for: | | | | | | | | | | | | | |
| *If draft order is seeking to dispense with a bond, indicate whether the documents below are being filed:* | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Applicant’s Affidavit | | | | | | | | Consents of all beneficiaries (Form 74H) | | | | | | | | | | | | | Other: | | | | |  | | | |
| *If draft order is seeking to defer tax payment per s. 4(2) of the* Estate Administration Tax Act*, indicate whether the documents below are being filed:* | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Applicant’s Affidavit | | | | | | | | Other: | | | | | | | | | | | | | | | | | | | | | |
| *If draft order is seeking any other order, indicate whether documents below are being filed:* | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Applicant’s Affidavit | | | | | | | | Other: | | | | | | | | | | | | | | | | | | | | | |

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| 4. Court file number, tax payment, original documents (Will, Codicil, Bond, etc.) | | | | | | | | | | | | | | | | | | | | | |
|  | | Was a paper application and/or supporting documents filed or submitted to the court? | | | | | | | | | | | | | | | | | | | |
|  | | If yes, it was submitted on | | | | | | | | | [Click to enter a date] | | | | | | | | by:  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 delivered to the court office on [Click to enter a date] by:  mail  courier  in person | | | | | | | | | | | | | | | | | | | |
|  | | The estate is valued in the application at $ | | | | | | | | | | | |  | | | | | | , and the estate administration tax payable is | |
|  | | $ | |  | | | consistent with the amount calculated using the [Estate Administration Tax Calculator](https://www.ontario.ca/page/calculating-estate-administration-tax) | | | | | | | | | | | | | | |
|  | | The estate administration tax, payable to "Minister of Finance", paid by: | | | | | | | | | | | | | | | | | | | |
|  | |  | | | certified cheque | | |  | | | | bank draft | | |  | | | | | | |
|  | | was delivered to the above-noted court office on [Click to enter a date] by:  mail  courier  in person | | | | | | | | | | | | | | | | | | | |
| *For Form 74J Applications for a Certificate of Succeeding Estate Trustee or a Certificate of Estate Trustee during Litigation,*  the filing fee of $138 will be paid by: | | | | | | | | | | | | | | | | | | | | | |
|  | | |  | | certified cheque | | | |  | | | | bank draft | | | |  | solicitor's cheque | | |
|  | | | was delivered to the above-noted court office on [Click to enter a date] by:  mail  courier  in person | | | | | | | | | | | | | | | | | |
|  | | | I am seeking to pay the estate administration tax deposit based on an estimated value of the estate and have indicated this is Part 9 of Form 74A or 74.1A or Part 7 of Form 74J. | | | | | | | | | | | | | | | | | | |
|  | | | **I will attach (or I have attached) a copy of this form to any documents/payments that I send to the court by mail, courier or in person.** | | | | | | | | | | | | | | | | | | |
| 5. Certificate Delivery | | | | | | | | | | | | | | | | | | | | | |
| If the Certificate requested is granted, I request an issued Certificate: | | | | | | | | | | | | | | | | | | | | | | | |
| in electronic format immediately by email | | | | | | | | | | | | | | | | in paper format which I will pick up at the above-noted court office | | | | | | |
| 6. Declarations | | | | | | | | | | | | | | | | | | | | | |
| By submitting this form to the court, I acknowledge that: | | | | | | | | | | | | | | | | | | | | | |
|  | This form and the attached documents are being submitted for the purpose of filing a probate application with the Superior Court of Justice pursuant to rule 74 or 74.1 of the *Rules of Civil Procedure.* | | | | | | | | | | | | | | | | | | | | |
|  | 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. | | | | | | | | | | | | | | | | | | | | |
|  | The court or registrar may send any communication or document by email, including a Registrar’s Notice, Certificate of Appointment, court orders and endorsements pursuant to rule 4.12 of the *Rules of Civil Procedure.* | | | | | | | | | | | | | | | | | | | | |
|  | I will receive an electronic Certificate of Appointment unless I have requested a Certificate in paper format. | | | | | | | | | | | | | | | | | | | | |
|  | Documents that I am submitting by email will be relied upon by court staff rather than any earlier paper document submissions (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: | | | | | | | | |  | | | | | | | | | | | |
|  | All of the documents that I am submitting contain the same date of death and the same date of the Will/Codicil *(if applicable)*. | | | | | | | | | | | | | | | | | | | | |
|  | I have complied with the document filing requirements established by the *Rules of Civil Procedure* and the [Consolidated Civil Provincial Practice Direction dated June 15, 2023](https://www.ontariocourts.ca/scj/practice/consolidated-civil-pd/#_Toc136336829), Part IV, paragraph 88. | | | | | | | | | | | | | | | | | | | | |
| **Additional Information:** | | | | | |  | | | | | | | | | | | | | | | |
| **To learn more about applying for probate visit:**  <https://www.ontario.ca/page/apply-probate-estate>  <https://www.ontario.ca/page/probate-small-estate> | | | | | | | | | | | | | | | | | | | | | |