

Estate Trustee Liability Insurance Application - Part A

(including Estate Trustees, Executors and Estate Administrators)

Decedent Details

Last Name:		Given Name:		Initial:	
Primary Residence Address:		City:	Province:	Postal Code:	
Date of Birth:			Date of Death:		

Details of the Will

Is there a will? Yes No					
If No, proceed to the next section					
Status of Probate (select one of the following):					
Probate has been granted					
Probate will be obtained within 12 months.					
*IMPORTANT: The coverage period and liability limits are restricted prior to the Will being probated.					
Is there a secondary Will? Yes No					
If yes, are the Estate Trustees and Beneficiaries the same on each will? Yes No					
Are there any Beneficiaries outside of Canada? Yes No					
If yes, location(s) of foreign Beneficiaries: US Other:					

Estate Assets

Estimated total value of estate assets: (Note: Estates over \$3 million will require additional underwriting information)					
Are there any foreign assets? Yes No					
If yes, approximate value of foreign assets (if known):					
Are there any business assets? Yes No					
If yes, approximate value of business assets (if known):					
Is there current and up-to-date physical damage insurance and third party liability insurance on the estate assets? Yes No					

Lawyer Details

Law Firm Name:
Address:
Lawyer Name:
Phone:
Email:

Insurance Broker Details (if applicable)

Brokerage Name:
Address:
Broker Name:
Phone:
Email:

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Estate Trustee Liability Insurance Application - Part B

Estate Trustee Information (all questions in this section are relative to the Estate Trustee named below)

Is there more than one Estate Trustee? Yes No			
If yes, please complete a copy of this page for each Estate Trustee			
First Name:		Middle Initial:	Last Name:
Date of Birth: (dd/mm/yyyy)		Email Address:	
Home Address (Street):		City:	Province: Postal Code:
Home Phone:		Cell Phone:	
Occupation of Estate Trustee:			
Is the Estate Trustee providing professional services to the estate as a Mortgage Broker, Investment Advisor, Real Estate Broker, Insurance Agent or Insurance Broker, Public Accountant or Solicitor? Yes No If yes, please provide the following:			
<div style="margin-left: 40px;"> Company Name: Address: <div style="display: flex; justify-content: space-between; width: 80%;"> Street City Province/State Postal Code </div> Phone Number: </div>			
Education Level of the Estate Trustee:			
Some High School		High School	Some College/University
College/University		Graduate School	Other: Unknown
Estate Trustee's Relationship to Decedent:			
Spouse		Child	Sibling
Parent		Other:	
Was the Estate Trustee appointed in the will? Yes No			
If no:			
• Was the Estate Trustee selected by:		Beneficiaries/Family Members	Courts/Other
• Date of Appointment (if known):			
Is the Estate Trustee also a beneficiary of the estate: Yes No			
Is there an ongoing Trust other than the Estate: Yes No			
If yes, is the Estate Trustee also a Trustee of this Trust?		Yes	No
(Note: Trusts will require additional underwriting information)			
Were there any previously named Estate Trustees? Yes No			
If yes, please provide details on the circumstances that led to a new Estate Trustee being appointed:			
Have any claims for damages been made, either verbally or in writing, against the estate or any of the estate trustees (past or present)? Yes No If yes, please provide additional details:			