

Estate Trustee Liability Insurance Application - Part A

(including Estate Trustees, Executors and Estate Administrators)

 Application Date: _____
 (dd/mm/yyyy)

Decedent Details

Last Name:		Given Name:		Initial:	
Primary Residence Address:			City:	Province:	Postal Code:
Age at Death:	Date of Death:		Marital Status:		

Details of the Will

1. Is there a will? Yes No If No, proceed to the next section; if Yes, please provide a copy.					
2. What is the date of the will? If the will was drafted within the 6 months prior to the date of death, please provide details on Part C.					
3. Status of Probate (select one of the following):					
Probate has been granted		Probate application will be filed		Probate is not required	
4. Is there a secondary will? Yes No					
If yes, are the Estate Trustees and Beneficiaries the same on each will?				Yes	No
5. Are there any Beneficiaries residing outside of Canada? Yes No					
If yes, location(s) of foreign Beneficiaries:		US	Other:		

Estate Assets

1. Estimated gross <u>total</u> value of all estate assets from primary and secondary wills: (Note: Estates over \$3 million will require additional underwriting information)					
2. Are there any foreign assets? Yes No If yes, approximate value of foreign assets:					
3. Are there any business assets? Yes No If yes, approximate value of business assets:					
4. Were any of the deceased's assets transferred to another party or sold in the 2 years prior to the Date of Death?					
Yes	No	Unknown	If yes, please provide details on Part C.		
5. Are any assets held jointly with another party? Yes No If yes, please provide details on Part C.					
6. Is there current physical damage insurance and third party liability insurance on the estate assets where applicable? Yes No					
7. Do any of the estate assets consist of stored genetic material? Yes No If yes, please provide details on Part C.					

Lawyer/Notary/CEA Details

Firm Name:	
Address:	
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		

Last Name:	Given Name:	Initial:	
Age:	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:			
Company Name:			
Address:			
	Street		
	City	Province/State	Postal Code
	Phone Number:		
Education Level of the Estate Trustee:			
High School	College/University	Graduate School	Other:
Estate Trustee's Relationship to Decedent:			
Spouse	Child	Sibling	
Parent	Other:		
1. 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):			
2. Is the Estate Trustee also a beneficiary of the estate: Yes No			
3. Did the Estate Trustee perform duties for the Decedent under a Power of Attorney for Property within the last 12 months prior to the date of death? Yes No			
4. Is a testamentary Trust being created? Yes No			
If yes, is the Estate Trustee also a Trustee of this Trust?		Yes	No
5. Are you replacing any previously named Estate Trustee? Yes No			
If yes, please provide details on the circumstances that led to your appointment on Part C.			
6. Have any claims for damages been made, either verbally or in writing, including any circumstances or threatened action which any reasonable person would expect to give rise to a demand for damages against the estate or any of the estate trustees (past or present)? Yes No If yes, please provide additional details on Part C.			

Estate Trustee Liability Insurance Application - Part C

Part A - Details of the Will

2. What is the date of the will?

If the will was drafted within the 6 months prior to date of death, please provide the following information:

a) Was there a prior will? Yes No Unknown If yes, date of prior will:
 Please provide a copy of the prior will.

b) Are there material changes to the executor(s), beneficiaries or distributions? Yes No If yes, please provide details.

c) Who drafted the most recent will?

d) Was there a competency test done prior to the will being drafted? Yes No Unknown

Part A - Estate Assets

4. Were any of the deceased's assets transferred to another party or sold in the 2 years prior to the Date of Death?

Yes No Unknown

If the value of the asset transferred or sold exceeds \$50,000 or 10% of the total value of the estate assets, please provide details.

Transfer	Sale	Date	Description of Asset	Estimated Value of Asset	Reason for Sale/Transfer

5. Were any of the deceased's assets held jointly with another person?

Yes No

If yes, please provide the following details.

Name	Relationship to Deceased	Description of Asset	Estimated Value of Asset	Joint Tenancy or Tenants in Common	Is asset to be included in Estate?
				Joint Tenancy	Yes
				Tenants in Common	No
				Joint Tenancy	Yes
				Tenants in Common	No

7. Do any of the estate assets consist of stored genetic material? Yes No

If yes, please provide a detailed description including copies of contract(s) respecting same.

Part B - Estate Trustee Information

5. Are you replacing any previously named Estate Trustee? Yes No
 Please provide details on the circumstances that led to your appointment.

6. Have any claims for damages been made, either verbally or in writing, including any circumstances or threatened action which any reasonable person would expect to give rise to a demand for damages against the estate or any of the estate trustees (past or present)? Yes No Please provide additional details.