



Ministry of Finance
 33 King St W
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 Oshawa ON L1H 8H9

Estate Information Return

Estate Administration Tax Act, 1998

Enquiries: 1 866 ONT-TAXS (1 866 668-8297)
 1 800 263-7776 Teletypewriter (TTY)
 1 866 888-3850 (Fax)

Ministry Use Only - Date Received

If you received a certificate of appointment of estate trustee from the Ontario Superior Court of Justice, this return **must** be completed and **received by the Ministry of Finance within 90 calendar days** after the certificate of appointment of estate trustee is issued. It will be used by the Ministry of Finance to administer the *Estate Administration Tax Act, 1998*.

If after submitting this return, you discover information was incorrect or incomplete, an amended return must be received by the Ministry of Finance **within 30 calendar days** from when the error or additional information about the property of the estate is known. See guide for additional information.

Is this an Amended Return? Please explain below why this return is being amended ▼
 (if yes, check box)

Reason: (Note: If the return is amended due to a fulfillment of an undertaking, include particulars and amounts of additional tax paid.)

A Information about the Certificate of Appointment of Estate Trustee

Indicate which type of certificate of appointment of estate trustee was granted by the Court (please choose one)

Form No.

- 74.13 Certificate of Appointment of Estate Trustee with a Will
- 74.13.1 Certificate of Appointment of Estate Trustee with a Will Limited to the Assets Referred to in the Will
- 74.20 Certificate of Appointment of Estate Trustee without a Will
- 74.20.3 Certificate of Appointment of Foreign Estate Trustee's Nominee as Estate Trustee without a Will
- 74.28 Confirmation by Resealing of Appointment of Estate Trustee
- 74.29 Certificate of Ancillary Appointment of Estate Trustee with a Will

Date (yyyy/mm/dd)

Enter the date above Certificate/Confirmation was issued

Enter the Court File No. assigned

Which Superior Court of Justice in Ontario was used to file your application? (please specify location)

Was the deposit amount submitted based on an estimated value of the estate?
 If yes, please attach a copy of the undertaking submitted to the court.

Yes	No	Date of Undertaking (yyyy/mm/dd)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>

Was the certificate of appointment of estate trustee issued without payment
 of deposit equal to tax?

Yes	No
<input type="checkbox"/>	<input type="checkbox"/>

(subsections 4(1) and (2) of the *Estate Administration Tax Act, 1998*)

If yes, please attach a copy of the court order and details about the security provided to the court.

