

Index

ACCOUNTS. *See* PASSING OF ACCOUNTS

ADMINISTRATION

administrator. *See* ADMINISTRATOR
common form practice. *See* COMMON FORM PRACTICE

defined, 311

distribution of estate, 337-350

ascendants and collaterals, rights of, 343

consent of Children's Lawyer/public guardian and trustee, 349-350

degrees of kindred, 344

generally, 337-338

SLRA table of intestate distribution, 345-349

surviving issue, rights of, 340-343

surviving spouse, rights of, 338-340

entitlement to grant of, 321-331

creditor, 328-330

generally, 321

married/common-law spouse, 321-324

next of kin, 324-327

nominee of next of kin, 327

public guardian and trustee, 330

escheats, 362-363

generally, 311

grant of, effect of, 314

grant under discretionary power, 331-334

history and jurisdiction, 312-313

jurisdiction, 312-313

limited and special administration

administration *ad colligenda bona* (to collect goods), 393

administration *ad litem* (by litigation administrator), 399-402

administration *durante absentia* (during absence), 386-388

administration *durante minore aetate* (during minority), 388-390

administration for use and benefit of person under disability, 390-392

administration *pendent lite* (during litigation), 393-399

attorneys, grants to, 384-386

caeterorum grant, 380

generally, 377

grants save and except, 380

multiple wills, 378

original will/codicil unavailable, 379

litigation. *See* LITIGATION

orders, pre-grant, 334-337

generally, 334-337

minors, 337

practice in obtaining administration, 350-362

administration bond, 353-362

affidavit of service of notice of application, 352

application for certificate of appointment of estate trustee without will, 351

consent of persons interested, 353

renunciation by those having prior right, 353

succeeding. *See* ADMINISTRATION BY SUCCEEDING ESTATE TRUSTEE

terminology, 311

ADMINISTRATION BY SUCCEEDING ESTATE TRUSTEE

certificate of appointment, 371

cessate grants, 375

double probate, 376

generally, 371-373

with will annexed, 373-375

ADMINISTRATION DE BONIS NON.

See ADMINISTRATION BY SUCCEEDING ESTATE TRUSTEE

ADMINISTRATION WITH WILL
ANNEXED

application for grant of, 369
nature and use, 365
practice in obtaining, 369
succeeding estate trustee, 373-375
to whom grant made, 366-369

ADMINISTRATOR, *see also*

ADMINISTRATION

acceptance/refusal of office, 320
actions before receiving grant, 314-318
appointment of, entitlement, 318-320
doctrine of relation back, 315-316
title of, 314-318

ALTERATIONS IN GRANTS, 403-405

ALTERATIONS TO WILL. *See* WILLS

APPEALS

dependants' support, 222
final orders, 573-575
interlocutory orders, 575

ARMED FORCES, MEMBERS OF,
127-131

ATTESTATION

attesting witness, examination of, 463
generally. *See* EXECUTION AND
ATTESTATION

AUDIT. *See* PASSING OF
ACCOUNTS

CAPACITY

age, 47-49
fraud, 78-80
knowledge and approval, 80-84
mistake, 84-87
suspicious circumstances, 66-74
Vout v. Hay, principles in, 71-73
testamentary. *See* TESTAMENTARY
CAPACITY
undue influence, 74-78

CERTIFICATE OF APPOINTMENT.

See COURTS OF PROBATE;
REVOCATION OF CERTIFICATE
OF APPOINTMENT; PROBATE

CLAIMS, CONTESTATION OF

"claim or demand", meaning of, 500-502
Estates Act code of procedure, 497-500
limitation period, 500, 503-504

Rules of Civil Procedure provisions,
502-503

CODICIL, *see also* WILLS

affidavit of condition of will/codicil, 307
deposit of, 10
holograph codicil, 134
obtaining probate, 305
revocation of will and. *See*
REVOCATION OF WILL
unavailability of, 379
valid, 140

COMMON FORM PRACTICE

applications for probate, administration,
guardianship, 270-271
court applied to, 267-270
death, proof of
common law presumption of death,
280-282
Declaration of Death Act, 2002,
275-280
generally, 274-276
survivorship. *See* survivorship
Estates Administration Tax Act,
provisions of, 272-274
renunciation by executor, requirements
re, 288-292
small value estates, 292-293
statement of assets, 271-274
survivorship, 282-288
common disasters, 285
common law, 283
death at same time, presumption of
seniority, 283-284
generally, 282
simultaneous deaths, 285-287
Succession Law Reform Act, 286-287
Survivorship Act, 283-288

COMPENSATION OF EXECUTORS
AND TRUSTEES, *see also*
SOLICITORS' FEES

agreement, by, 554
amount, 558-566
care and management fees, 564
division of compensation
five factors approach, 559
generally, 558-564
maximum, 563
percentages basis, 558
principles, 561
special fee, 565, 566
by whom compensation borne, 568

directors' fees, 566-568
 disentitling conduct, 555-557
 fixed by instrument, 551
 generally, 549-551
 legacy in lieu of, 553
 pre-taking, 568-571

CONFLICT OF LAWS

characterization of issue, 409-410
 choice of law, 411-425
 administration, 421
 construction, 417-419
 generally, 411-413
 powers of appointment, 423-425
 procedure, 423
 revocation, 419-421
 testamentary capacity, 417
 wills disposing of interests in land
 essential validity, 415
 formal validity, 413
 wills of movables
 essential validity, 416
 formal validity, 415
 domicile, 425-427
 generally, 407-409
 grants outside Ontario, 427-439
 ancillary grants, 429-434
 generally, 427-429
 Quebec grants, 439
 resealing, 434-439
 substitute decisions, 440

CONTENTIOUS PROCEEDINGS, *see* *also* COURTS OF PROBATE; LITIGATION

caveats, 459-462
 directions, applications for, 473-475
 generally, 457-459
 notices of objection, 459-462
 opinion/advice/direction of court,
 application for, 478-480
 proof in solemn form (*per testes*), 462-473
 delay, consequences of, 465-468
 examination of attesting witness, 463
 notice requirements, 464
 procedure, 465
 right to bring claims, 468-473
 trial by jury, 476-478

CONTESTATION OF CLAIMS, 497-504

COSTS

dependants' support, 223
 out of estate, 579-593

case law, examples, 582-593
 executor's indemnification, 586-587
 multiple sets of costs, 590
 proportionality, 582
 reasonable inquiry factors, 581-582
 rules re, 579
 testator contributing to litigation,
 examples, 581
 traditional view, 580
 passing of accounts, 522-526
 proof in solemn form, 577

COURTS OF PROBATE, *see also*

CONTENTIOUS PROCEEDINGS;
 PROBATE
 contentious proceedings (Rule 75), 5-9,
 33-42
 claims against estate, notice, 41
 directions, application/motion
 for, 36-39
 formal proof of testamentary
 instrument, 33
 generally, 5-9
 lawyer of record, 42
 lost/destroyed will, proof of, 33-34
 objection to issuing certificate of
 appointment, 34-35
 return of certificate, 35-36
 revocation of certificate of
 appointment, 35
 statement of claim served, procedure
 where, 39
 submission of rights to court, 40
 forms, 46
 non-contentious proceedings (Rule 74),
 5-33
 application for certificate of
 appointment of estate trustee,
 general procedure, 19
 authentication of certificate of
 appointment, 22
 bonds, 19
 certificate of ancillary appointment
 of estate trustee with will, 18
 certificate of appointment of estate
 trustee during litigation, 18
 certificate of appointment of estate
 trustee with will, 12-13
 certificate of appointment of estate
 trustee without will, 14
 certificate of appointment of foreign
 estate trustee's nominee (without
 will), 15

- certificate of appointment of succeeding estate trustee with will, 16
 - certificate of appointment of succeeding estate trustee without will, 17
 - commencement of proceedings, request for notice of, 11
 - confirmation by resealing of appointment of estate trustee, 17
 - confirmation of estate trustee, 23
 - definitions, 9
 - deposit equal to tax, 20-22
 - deposit of wills and codicils for safekeeping, 10
 - generally, 5-9
 - issuing certificate of appointment of estate trustee, 22
 - orders for assistance, 24-25
 - passing of estate accounts. *See* passing of estate accounts
 - passing of estate accounts, 26-33
 - application, hearing and judgment, 26-33
 - form of accounts, 26
 - practice, legislation and rules governing, 4-5
 - Rules of Civil Procedure*, 5-43
 - contentious proceedings. *See* contentious proceedings (Rule 75)
 - generally, 5-9
 - mandatory mediation, 42
 - non-contentious proceedings. *See* non-contentious proceedings (Rule 74)
 - old surrogate court terminology vs., 5-6
 - Superior Court of Justice
 - estates/commercial list of, 3-4
 - testamentary jurisdiction, 43-46
 - surrogate courts, history of, 1-4
- DEATH**
- dependant, of, 199
 - matrimonial property division on. *See* MATRIMONIAL PROPERTY DIVISION ON DEATH
 - proof of. *See* COMMON FORM PRACTICE
- DEPENDANTS' SUPPORT**
- adequacy of support provisions, 202-212
 - changes in circumstances, 207-208, 211
 - conduct by spouse, 209-210
 - determination of amount, SLRA provisions re, 204-205
 - emotion/feelings factor, 209-210
 - ethical vs. economic questions, 205-208
 - general principles, 208-209
 - standard of living, 207, 210
- appeals, 222
- contracting out, 198
 - costs, 223
 - death of dependant, 199
 - “dependant”, meaning of, 196
 - domestic contracts, effects of, 199
 - jurisdiction, 195
 - legislative background, 193-195
 - matrimonial property division on death. *See* MATRIMONIAL PROPERTY DIVISION ON DEATH
 - order re
 - form of, court discretion, 212-215
 - prerequisites to, 196-203
 - property against which made, 215-219
 - “parent”, meaning of, 198
- practice
- appeals, 222-223
 - applications, 219-224
 - costs, 223
 - extension of time, 220
 - limitation period, 222
 - mental incapacity, 221
 - notice of application, service of, 221
 - variation order, application for, 220
- providing support immediately before deceased's death, requirement re, 200-202
- SLRA provisions, 194-196
- “spouse”, provincial variations in meaning, 196-198
- DISTRIBUTION**
- estate, of. *See* ADMINISTRATION
 - matrimonial property, 229
- ESCHEATS**, 362-363
- ESTATE TRUSTEE**, *see also* EXECUTOR
- accounts of, audit of, 526-528
 - certificate of appointment. *See* CERTIFICATE OF APPOINTMENT
 - executor vs., 225

probate proceedings. *See* COURTS OF PROBATE

succeeding. *See* ADMINISTRATION BY SUCCEEDING ESTATE TRUSTEE

terminology re, 235

trustee vs., 235-237

EXECUTION AND ATTESTATION

attestation by witnesses

presence of testator, 107

requirements, 106-107

generally, 96-97

holograph wills, 119-127

mark, will executed by, 309

presumption of validity (due execution), 115-119

signature

acknowledgment of by testator, 104-106

by another for testator, 100

position of, 100-104

requirements, 98-99

SLRA provisions re, 97-99

written requirement, 97-98

EXECUTORS

accounts of, 507, 532

appointment of

generally, 237

manner of, 242-246

persons entitled, 238-242

qualified appointment, 246-248

citation of, 299

compensation of. *See* COMPENSATION OF EXECUTORS AND TRUSTEES

devolution of executorship, 248

estate trustee with a will vs., 225

generally, 235-237

indemnification of, 586-587

passing over, 239-240, 249-264

application re, 250

persons entitled to act as, 238-242

pre-probate powers, 297-299

qualifications, 238

qualified appointment, 246-248

removal of, 249-264

circumstances/grounds for, 254-264

principles re, 252-254

Trustee Act provisions, 251

renunciation, 264-265, 288-292, 307

Superior Court of Justice jurisdiction re, 249-250

terminology, 235

trustee vs., 235-237

GRANT

alterations in, 403-405

generally. *See* ADMINISTRATION outside of Ontario. *See* CONFLICT OF LAWS

revocation of. *See* REVOCATION OF GRANT

HOLOGRAPH WILL. *See* WILLS

INCORPORATION OF DOCUMENTS. *See* WILLS

INTERNATIONAL WILLS, 144-146

INTESTATE

administration of estate. *See* ADMINISTRATION

distribution of estate, 345-349

JOINT WILLS, 186-188

LITIGATION, *see also* CONTENTIOUS PROCEEDINGS

administration *ad litem*, 399-402

administration *pendent lite*, 393-399

practice in obtaining administration, 398-399

LOST/MISSING WILLS

generally, 481

procedure, 481-482

proving, 34-35, 483-487

destruction *animo revocandi*,

presumption re, 485-487

standard of proof, 484

test, 483

revocation of will and, 166-169

MARINERS, WILLS OF, 127-131

MARRIAGE. *See* DEPENDANTS' SUPPORT; MATRIMONIAL PROPERTY DIVISION ON DEATH; REVOCATION OF WILL

MATRIMONIAL PROPERTY DIVISION ON DEATH, *see also* DEPENDANTS' SUPPORT

claim by spouse, 226

distribution, restriction on pending

election, 229

domestic contract, claim through, 227

entitlement. *See* net family property
Family Law Act claims, 226-233
 family law separation/divorce
 entitlements vs., 224
 history, 224
 limitation periods, 228
 nature of claim, 224-226
 net family property
 calculation of, 230-233
 definition of, 229
 personal representative of spouse,
 application by, 227

MISSING WILLS. *See* LOST/MISSING
 WILLS

MUTUAL WILLS, 188-191

ORDERS FOR ASSISTANCE

generally, 443
 orders for assistance, 444-445
 return of certificate, 445
 revocation of certificate of appointment.
 See REVOCATION OF CERTIFI-
 CATE OF APPOINTMENT

PASSING OF ACCOUNTS

application, practice on, 509-528
 affidavit verifying accounts, 510
 charities, 513
 costs, 522-526
 form of accounts. *See* form of
 accounts
 generally, 509
 issuance, 511
 judgment, 528
 judgment without hearing, 521
 mediation, 528
 no response, 516
 notice of application, 510
 notice of no objection, 516
 notice of non-participation, 516
 notice of objection, 514
 persons under disability, 512
 replies to notices of objection and
 hearing, 526-528
 request for further notice, 515
 service, 511
 audit, proper court for
 estate trustees/executors/administra-
 tors, accounts of, 507
 guardians of property/attorneys for
 property, accounts of, 508
 motions, 508
 Toronto Estates List, 508

trustees' accounts, 508
 capital and income, 542-545
 compelling passing of accounts, 528-534
 attorney/guardian, SDA provisions,
 532-534
 executors, *Estates Act* provisions,
 530-532
 generally, 528-529
 grounds for order, 529
 corporate information, 535
 falsification, 539-541
 form of accounts, 517-521
 generally, 517
 investment accounts, 520
 receipts and disbursements, 519
 statement of assets at date of death/
 opening of accounting period, 518
 statement of compensation, 520
 statement of liabilities, 520
 statement of money and investments
 at closing date of accounts, 520
 statement of unrealized assets, 520
 summary of accounts, 521
 generally, 505
 judge, power of, 536-539
 judgment
 application, on. *See* application,
 practice on
 effect of, 545
 releases, 545-548
 surcharge, 539-541
 voluntary, 505-507

PROBATE, *see also* COURTS OF
 PROBATE

citation of executor, 299
 instruments of which probate may be
 granted, 300-303
 nature and use of, 295-299
 generally, 295-296
 pre-probate, executors' powers,
 297-299
 title to lands, 296
 practice directions, 308
 practice in obtaining, 303-308
 affidavit of condition of will/
 codicil, 307
 affidavit of execution, 306
 affidavit of service of notice, 306
 affidavit re handwriting, 307
 application for certificate of
 appointment of estate trustee
 with will, 304-305
 consent to appointment, 307

draft order, 308
 renunciation of executors, 307
 security, 308
 will and codicils, 305
 production of will, 299
 will executed by mark, 309

PROBATE PROCEDURE. *See*
 COURTS OF PROBATE

PROOF IN SOLEMN FORM. *See*
 CONTENTIOUS PROCEEDINGS;
 COSTS

REPUBLICATION/REVIVAL. *See*
 REVOCATION OF WILL

REVOCATION OF CERTIFICATE OF
 APPOINTMENT

examination, 451
 notice of motion, 451
 order
 accept/refuse appointment, 446
 beneficiary witness, to, 450
 bring in will, 451
 consent/object to proposed
 appointment, 449
 file statement of estate assets, 449
 former spouse, to, 450
 other matters, 451
 pass accounts, to, 450
 propound testamentary instrument
 in solemn form, 447-449
 return certificate, 452-454
 practice on, generally, 454
 service, 451

REVOCATION OF GRANT

effect of, 496
 entitlement to grant, disputed, 493-494
 generally, 489-492
 grant *per incuriam*, 493
 inoperative/ineffectual original grant, 495
 irregular grant, where, 492
 procedure, 489-492

REVOCATION OF WILL

act of destruction, 169-171
 conditional revocation, 169-173
 act of destruction, 169-171
 obliteration of part of will, 172-173
 destruction, by, 161-166
 destruction, presumption of, 166-169
 divorce and annulment of marriage,
 179-181

generally, 147-150
 later will/codicil, by, 155-160
 ambiguous language, 157
 holograph will/codicil, 155
 intention requirement, 155
 revival, 158-160
 SLRA provisions, 160
 will containing exercise of power, 158
 lost will, 166-169
 presumption of destruction, 166-169
 marriage, by, 150-155
 declaration requirement, 153-154
 onus of proof, 153
 power of appointment, 154
 presumption of marriage, 152
 SLRA provisions, 150-151
 void marriage, 151
 mistake, by, 149
 republication/revival, 173-179
 circumstances of revival, 175-176
 effect of, 176-179
 generally, 173-176
 intention to revive, 175
 re-execution, 174
 republication, effects of, 178-179
 republication vs. revival, 173
 revival, SLRA provisions, 174,
 177, 178
 SLRA provisions, 149
 spouses, property agreements
 between, 148
 writing showing intention to revoke,
 by, 160-161

SIGNATURES. *See* EXECUTION
 AND ATTESTATION

SOLICITORS' FEES, *see also*
 COMPENSATION OF EXECUTORS
 AND TRUSTEES

assessment, reasonableness basis, 598
 determining factors, 597
 percentages, 597
quantum meruit basis, 598
 rules re, 595-596

SPOUSES. *See* DEPENDANTS'
 SUPPORT; MATRIMONIAL
 PROPERTY DIVISION ON DEATH;
 REVOCATION OF WILL

SUCCEEDING ESTATE TRUSTEE.
See ADMINISTRATION BY
 SUCCEEDING ESTATE TRUSTEE

SUPPORT OBLIGATIONS. *See*
DEPENDANTS' SUPPORT

SURVIVORSHIP. *See* COMMON
FORM PRACTICE

SUSPICIOUS CIRCUMSTANCES,
66-74

TESTAMENTARY CAPACITY, *see*
also CAPACITY

capacity assessments, 61-65
delusions, 56-59
evidence of capacity, 61-65
execution, 60
generally, 49-53
lifelong incapacity, 55
lucid intervals, 59
marital capacity vs., 52
partial invalidity, 56-59
progressive dementia, 53-55
solicitor's negligence, capacity issues
and, 65
test re, 50-51

TESTAMENTARY INTENTION

alterations, 135
generally, 89-94
holograph will, 91-94, 126
inter vivos instruments and, 94-96
requirements, 92-94
revival, 175
revocation of will, 155, 160

TRUSTEE. *See* ESTATE TRUSTEE;
EXECUTOR

UNDUE INFLUENCE, 74-78

WILLS

alterations, 131-136
 holograph codicil, 134-135
 meaning of, 132-134
 obliterations, 136
 revocations, 136
 SLRA provisions re, 131
 testamentary intention
 requirement, 135
codicil to. *See* CODICIL
compliance with formal requirements,
108-115
 dispensation power, 110
 generally, 108
 mandatory compliance, 108-115
 standard of proof, 111

 substantial compliance, 109-115
 conditional/contingent, 183-186

dependants' support. *See*
DEPENDANTS' SUPPORT

execution and attestation. *See* EXECU-
TION AND ATTESTATION

holograph will

 execution, 119-127
 intentions issue, 126
 mixed hand written and printed
 wills, 121-126
 revocation, 155
 SLRA requirements, 119-120
 testamentary intention issue,
 91-94, 126
 validity, case law re, 121-127

incorporation of documents by reference,
137-144

 certainty re document, 139
 holograph will, in, 142-144
 improperly executed will with
 valid codicil, 140-141
 principle re, 137
 requirements re, 138

international wills, 144-146

joint wills, 186-188

lost will. *See* LOST/MISSING WILLS;
REVOCATION OF WILL

matrimonial property on death. *See*
MATRIMONIAL PROPERTY
ON DEATH

members of armed forces/mariners,
of, 127-131

multiple wills, 378

mutual wills, 188-191

presumption of validity (due execution),
115-119

probate practice. *See* PROBATE

revocation of. *See* REVOCATION
OF WILL

testamentary intention. *See* TESTA-
MENTARY INTENTION

types of, 89