

Table of Contents

Volume 1

<i>Dedication</i>	iii
<i>Preface</i>	v
<i>Table of Cases</i>	TC-1
<i>Chapter 1</i>	DEVELOPMENTS IN THE PRACTICE OF ESTATE
	LITIGATION
	1-1
1.1	Merger of Ontario Courts and Elimination of “Surrogate Court”
	1-1
1.2	<i>Substitute Decisions Act, 1992</i>
	1-2
1.3	Amendments to the Trustee Act
	1-2
1.4	New Rules of Procedure Regarding Estate Litigation
	1-3
	APPENDICES.....
	APP1-1
APP 1.1	Practice Direction Concerning the Estates List of the Superior Court of Justice in Toronto.....
	APP1-1
<i>Chapter 2</i>	CHALLENGING THE VALIDITY OF WILLS
	2-1
2.1	Nature of the Challenge
	2-1
(a)	Due Execution
	2-2
(b)	Testamentary Capacity
	2-3
(c)	Knowledge and Approval (“Suspicious Circumstances”)
	2-3
(d)	Undue Influence.....
	2-5
(e)	Onus of Proof.....
	2-5
2.2	Procedure — Revised Estate Rules.....
	2-6
(a)	General.....
	2-6
(b)	Procedure Under Rule 75
	2-6
(i)	Notice of Objection
	2-6
(ii)	Order for Return of Certificate of Appointment (R. 75.05).....
	2-7
(iii)	Notice to Objector.....
	2-7
(iv)	Motion for Directions
	2-7
(v)	Administrator During Litigation (Former Administrator Pendente Lite)
	2-8
(vi)	Submitting Rights to the Court
	2-9
(vii)	Order to Accept or Refuse Appointment as an Estate Trustee (Formerly Citation Order to Accept or Refuse Probate or Administration — R. 74.15(1)(a)(b)).....
	2-9

TABLE OF CONTENTS

(viii) Order to Revoke a Certificate of Appointment of Estate Trustee	2-10
(ix) Appeal.....	2-10
2.3 Suspicious Circumstances and Knowledge and Approval.....	2-10
(a) <i>Vout v. Hay</i>	2-11
1. Does the presence of suspicious circumstances impose a higher standard of proof?	2-11
2. What “circumstances” are “suspicious circumstances”?	2-12
(b) Case Law After <i>Vout v. Hay</i>	2-14
(c) Conclusion	2-17
2.4 Strategies to Quash a Spurious Will Challenge.....	2-18
(a) General.....	2-18
(b) Summary Judgment	2-19
(i) The Basis — Rule 20	2-19
(ii) Case Law	2-21
(c) Offers to Settle.....	2-22.1
2.5 Case Law	2-22.2
(a) General Principles.....	2-22.2
(b) Standard Required.....	2-46
(i) For Drafting Will	2-46
(ii) Retainer.....	2-58
(iii) Solicitor’s Liability	2-60
(c) Nature of Incapacity	2-60
(i) General Principles.....	2-60
(ii) Delusions	2-62
(iii) Eccentric Behaviour	2-75
(iv) Physical Infirmary	2-76
(v) Senile Dementia	2-81
(vi) Miscellaneous Incapacities	2-90.3
(d) Suspicious Circumstances.....	2-91
(i) General Principles.....	2-91
(ii) Burden of Proof	2-119
(iii) Relevant Time.....	2-128
(iv) Practice and Procedure.....	2-133
APPENDICES.....	APP2-1
APP 2.1 Form 4D Affidavit	APP2-1
APP 2.2 Form 59A Order	APP2-2
APP 2.3 Form 59B Judgment	APP2-3
APP 2.4 Form 75.1 Notice of Objection	APP2-4
APP 2.5 Form 75.2 Notice that Objection has been Filed	APP2-5
APP 2.6 Form 75.3 Notice to Objector	APP2-6
APP 2.7 Form 75.4 Notice of Appearance	APP2-7

TABLE OF CONTENTS

APP 2.8	Form 75.6 Notice of Motion for Directions.....	APP2-8
APP 2.9	Form 75.7 Statement of Claim Pursuant to Order Giving Directions	APP2-9
APP 2.10	Form 75.8 Order Giving Directions Where Pleadings Directed	APP2-11
APP 2.11	Form 75.9 Order Giving Directions Where Trial of Issues Directed	APP2-13
APP 2.12	Form 75.10 Statement of Submission of Rights to the Court	APP2-15
APP 2.13	Form 75.11 Notice of Settlement	APP2-16
APP 2.14	Form 75.12 Rejection of Settlement.....	APP2-17
APP 2.15	Headings for Forms used in Estate Litigation ...	APP2-18
APP 2.16	Table of Precedent Clauses	APP2-24
<i>Chapter 3</i>	ORDERS FOR ASSISTANCE (FORMERLY “CITATION ORDERS”)	3-1
3.1	Introduction	3-1
3.2	Order to Accept or Refuse Appointment: R. 74.15(1)(a) & (b)	3-2
3.3	Order to Bring in a Testamentary Document: S. 9 of the <i>Estates Act</i>	3-3
3.4	Order to Consent or Object to Proposed Appointment: R. 74.15(1)(c).....	3-4
3.5	Order to File Statement of Assets of the Estate: R. 74.15(1)(d) & (e)	3-4
3.6	Order to a Beneficiary Witness: R. 74.15(1)(f).....	3-5
3.7	Order to Former Spouse Named as Estate Trustee: R. 74.15(1)(g).....	3-5
3.8	Order to Pass Accounts: Rule 74.15(1)(h).....	3-5
3.9	Other Orders for Assistance: R. 74.15(1)(i)	3-5
	APPENDICES	APP3-1
APP 3.1	Form 4D Affidavit	APP3-1
APP 3.2	Form 59A Order	APP3-2
APP 3.3	Form 74.36 Order to Accept or Refuse Appointment as Estate Trustee with a Will	APP3-3
APP 3.4	Form 74.37 Order to Accept or Refuse Appointment as Estate Trustee without a Will.....	APP3-4
APP 3.5	Form 74.38 Order to Consent or Object to a Proposed Appointment of an Estate Trustee with or without a Will	APP3-5
APP 3.6	Form 74.39 Order to File a Statement of Assets of the Estate	APP3-7
APP 3.7	Form 74.40 Order to Beneficiary Witness.....	APP3-8
APP 3.8	Form 74.41 Order to Former Spouse.....	APP3-9

TABLE OF CONTENTS

	APP 3.9 Order for directions — Estate List proceedings — Applications — Motions (sample terms).....	APP3-19
	APP 3.10 Headings for Forms Used in Estate Litigation	APP3-21
	APP 3.11 Table of Precedent Clauses	APP3-24
<i>Chapter 4</i>	DEPENDANT SUPPORT CLAIMS	4-1
	4.1 Nature of the Relief.....	4-1
	4.2 Initiation of Proceedings.....	4-1
	4.3 Status to Bring the Application	4-2
	4.4 Who is a “Dependant”?.....	4-3
	4.5 Limitation Period	4-4
	4.6 Interim Orders	4-4
	4.7 The Separated Spouse as “Dependant”	4-5
	4.8 Claims by Adult Children	4-6
	4.9 Preserving the Estate Pending Hearing.....	4-7
	4.10 Determination of “Adequate Provision” by Court	4-7
	4.11 Expanded Definition of “Estate” that Dependant can Claim Against	4-8
	4.12 The Effect of the Family Law Act.....	4-8.1
	4.13 Variation of Order.....	4-8.1
	4.14 Costs	4-8.2
	4.15 <i>Cummings v. Cummings</i> : The Moral Obligation of the Testator to a Dependant	4-8.2
	4.16 British Columbia’s <i>Wills Variation Act</i> : A Contrasting Statutory Framework.....	4-8.8
	4.17 A Review of the Case Law.....	4-8.10
	APPENDICES.....	APP4-1
	APP 4.1 Form 4D Affidavit	APP4-1
	APP 4.2 Form 59A Order	APP4-2
	APP 4.3 Form 14E Notice of Application.....	APP4-3
	APP 4.4 Headings for Forms Used in Estate Litigation ..	APP4-5
	APP 4.3 Table of Precedent Clauses	APP4-8
<i>Chapter 5</i>	PASSING OF ACCOUNTS AND EXECUTORS’ FEES ...	5-1
	5.1 General.....	5-1
	5.2 When is it Necessary to Pass Accounts	5-1
	5.3 Compelling a Passing of Accounts	5-2
	5.4 Form of Accounts	5-3
	5.5 Specific Account Entry Problems	5-5
	(a) Ex Dividends	5-5
	(b) Mortgage Payments	5-5
	(c) Accrued Interest to Date of Death	5-5
	(d) Funeral Expenses	5-5

TABLE OF CONTENTS

	(e) Legal Fees	5-6
5.6	Procedure on Passing Accounts	5-6
	(a) Unopposed Order v. Contested Hearing.....	5-6
	(b) Material Required on Application to Pass Accounts.....	5-7
	(c) Service of Application to Pass Accounts	5-7
	(d) Notice of Objection to Accounts and Notice of No Objection to Accounts	5-7
	(e) Unopposed Order on Passing of Accounts	5-8
	(f) Contested Hearing for Passing of Accounts	5-9
5.7	Executors' Compensation	5-9
	(a) Basis of Compensation for Personal Representative of an Estate.....	5-9
	(b) Relevant Criteria in Determining Amount of Compensation	5-10
	(c) Development of a Tariff Guideline.....	5-10
	(d) Current Position of the Courts with Respect to the Tariff Guideline	5-12
	(e) Some Specific Considerations with Respect to Executors' Compensation.....	5-16
	(i) Special Fee	5-16
	(ii) Compensation in Large Estates.....	5-16.1
	(iii) Where Solicitor is Both Fiduciary and Solicitor for the Estate	5-16.2
	(iv) Assets Transferred <i>In Specie</i>	5-16.3
	(v) Compensation Agreements.....	5-17
	(f) Charging the Executor's Compensation Against the Estate	5-17
	(g) Division of Compensation Among Co-Trustees	5-17
	(h) Use of Agents	5-18
	(i) Pre-taking Compensation.....	5-18
	(j) Practice and Procedure on Compensation Claims	5-19
	(i) General Procedure and Jurisdiction of the Court on Passing of Accounts.....	5-19
	(ii) Representing the Beneficiary	5-19
	(iii) Representing the Estate Trustee.....	5-20
	(iv) Costs of the Passing of Account and Offers to Settle.....	5-21
5.8	Case Law	5-22
	(a) General.....	5-22

TABLE OF CONTENTS

	(b) Current Position of the Courts with Respect to the Tariff Guideline	5-32
	(c) Where Solicitor is Both Fiduciary and Solicitor for the Estate	5-36
	(d) Compensation Agreements.....	5-37
	(e) Costs on a Contested Passing of Accounts	5-37
	(f) Practice and Procedure.....	5-42
	(g) Remuneration	5-50
	(h) Entitlement to Compensation (Effect of Conduct).....	5-58
	(i) Accounting (General Principles).....	5-65
	APPENDICES.....	APP5-1
	APP 5.1 Statement of Accounts	APP5-1
	APP 5.2 Form 74.42 Order to Pass Accounts.....	APP5-17
	APP 5.3 Form 74.43 Affidavit Verifying Estate Accounts.....	APP5-18
	APP 5.4 Form 74.44 Notice of Application to Pass Accounts.....	APP5-19
	APP 5.5 Form 74.45 Notice of Objection to Accounts.....	APP5-21
	APP 5.6 Form 74.46 Notice of No Objection to Accounts.....	APP5-22
	APP 5.7 Form 74.46.1 Notice of Non-Participation in Passing of Accounts.....	APP5-23
	APP 5.8 Form 74.47 Affidavit in Support of Unopposed Judgment on Passing of Accounts.....	APP5-24
	APP 5.9 Form 74.48 Notice of Withdrawal of Objection	APP5-25
	APP 5.10 Form 74.49 Request for Costs (Person other than Children’s Lawyer or Public Guardian and Trustee).....	APP5-26
	APP 5.11 Form 74.49.2 Request for Increased Costs (Estate Trustee).....	APP5-27
	APP 5.12 Form 74.49.3 Request for Increased Costs (Person other than Estate Trustee)	APP5-29
	APP 5.13 Form 74.50 Judgment on Unopposed Passing of Accounts.....	APP5-27
	APP 5.14 Form 74.51 Judgment on Contested Passing of Accounts.....	APP5-29
	APP 5.15 Headings for Forms Used in Estate Litigation	APP5-31
	APP 5.16 Table of Precedent Clauses	APP5-33
<i>Chapter 6</i>	ROLE OF THE CHILDREN’S LAWYER.....	6-1
	6.1 Introduction	6-1
	6.2 Historical Background.....	6-2

TABLE OF CONTENTS

6.3	Litigation Guardian of Last Resort	6-2
	(a) Minors.....	6-2
	(b) Unborn and Unascertained Issue	6-3
6.4	Minors' Funds	6-4
	(a) Payments Into Court.....	6-4
	(b) Payments Out of Court	6-5
	(i) Motion for Payment Out of Court.....	6-5
	(ii) Children's Lawyer <i>Ex Parte</i> "Fiat" Procedure.....	6-5
	(iii) Real Property	6-5
6.5	Guardian of Property.....	6-6
6.6	Settlements on Behalf of Minors.....	6-7
	(a) Jurisdiction.....	6-7
	(b) Procedure.....	6-7
6.7	Proceedings About the Will: Validity and Interpretation.....	6-9
	(a) Jurisdiction.....	6-9
	(i) Validity.....	6-9
	(ii) Interpretation.....	6-9
	(b) Procedure.....	6-9
6.8	Passing of Accounts/Audits.....	6-10
	(a) Jurisdiction.....	6-10
	(b) Procedure.....	6-10
	(c) Protocol with Public Guardian and Trustee.....	6-11
	(d) Costs	6-11
	(e) Guardian of Minor's Property	6-11
6.9	Removal/Replacement of Trustees.....	6-12
	(a) Jurisdiction.....	6-12
	(b) Procedure.....	6-12
	(c) Intention of Testator.....	6-12
	(d) Encroachment on Capital	6-12
	(e) Qualifications of New Trustees	6-13
	(f) Misconduct, Mismanagement	6-13
	(g) Passing of Accounts.....	6-13
6.10	Sufficiency of Support and Entitlement.....	6-13
	(a) Applications on Behalf of a Minor.....	6-13
	(b) Applications Against the Estate Where There is a Minor Beneficiary	6-14
	(c) Limitation Period of Six Months	6-15
	(d) Conflict of Interest	6-15
	(e) Passing of Accounts.....	6-16
	(f) Assets	6-16
	(g) Settlement for the Benefit of Minors.....	6-16

TABLE OF CONTENTS

6.11 Applications to Approve the Sale of Property to Trustees	6-16
(a) Jurisdiction.....	6-16
(b) Procedure.....	6-16
(c) Previous Acquisitions by Trustee or Personal Representative.....	6-17
(d) Costs	6-17
6.12 Practice and Procedure Sale of Land: Ss. 15, 17 and 22 of the <i>Estates Administration Act</i>	6-17
(a) Persons on Whose Behalf the Children’s Lawyer Approves	6-17
(b) Purpose of the Act is Protection of Minors, Mentally Incapable Persons, and Non-Concurring Persons	6-18
(c) Duties of Estate Trustee Without a Will or Estate Trustee With No Power to Sell Real Property	6-18
(d) Approval of the Children’s Lawyer Not Required.....	6-19
(e) Where All Beneficiaries Are Minors	6-19
(f) Approval of the Children’s Lawyer	6-20
(g) Minors Age Sixteen or Over.....	6-20
(h) Vested Real Property	6-20
(i) Application for the Approval of the Children’s Lawyer	6-20
6.13 Practice and Procedure Sale of Land Owned by Minors: S. 59 of <i>Children’s Law Reform Act</i>	6-23
(a) Purpose of the Act.....	6-23
(b) Application for Court Approval	6-23
(c) Procedure Following Judgment.....	6-25
(d) Procedure Following Registration	6-26
(e) Mortgages	6-26
6.14 Mortgaging Property Owned by a Minor	6-26
(a) Application for Court Approval	6-26
6.15 Variations of Trusts.....	6-27
APPENDICES.....	APP6-1
APP 6.1 Applications for Payment Out of Court	APP6-1
APP 6.2 Form 4D Affidavit or Declaration of Personal Representative.....	APP6-6
APP 6.3 Form 74.20 Certificate of Appointment of Estate Trustee Without a Will	APP6-7

TABLE OF CONTENTS

APP 6.4	Condition in Agreement of Purchase and Sale with Regard Children's Lawyer or Court Approval	APP6-9
APP 6.5	Consent of Minor Sixteen and Over	APP6-10
APP 6.6	Caution — Land	APP6-11
APP 6.7	Consent of Children's Lawyer of Late Filing of Caution.....	APP6-12
APP 6.8	Statement of Adjustments	APP6-13
APP 6.9	Consent of Adult Beneficiaries.....	APP6-14
APP 6.10	Acknowledgement and Direction	APP6-15
APP 6.11	Transfer by Personal Representative in Preparation.....	APP-18
APP 6.12	Solicitor's Account	APP6-20
APP 6.13	Statement of Distribution	APP6-21
APP 6.14	Consent of Minor.....	APP6-22
APP 6.15	Form 59B Judgment	APP6-23
APP 6.16	Title of Proceedings Where Property Held in Estate	APP6-24
APP 6.17	Statement of Adjustments and Distribution	APP6-25
APP 6.18	Acknowledgement and Direction	APP6-26
APP 6.19	Transfer in Preparation	APP6-29
APP 6.20	Charge/Mortgage of Land	APP6-31
APP 6.21	Consent	APP6-33
APP 6.22	Headings for Forms Used in Estate Litigation ..	APP6-34
APP 6.23	Table of Precedent Clauses	APP6-37

Chapter 7

	ROLES OF THE PUBLIC GUARDIAN AND TRUSTEE IN ESTATE LITIGATION.....	7-1
7.1	Introduction	7-1
7.2	The Roles of the Public Guardian and Trustee.....	7-2
	(a) As Administrator, Personal Representative or Trustee	7-2
	(i) Quantum Meruit Claims.....	7-3
	(ii) Dependants' Claims	7-3
	(iii) Applications for Advice and Directions	7-4
	(iv) Applications to Prove or Challenge a Will.....	7-4
	(v) Applications for Variations of Trusts...	7-4
	(vi) Applications to Replace or Remove a Personal Representative.....	7-4
	(vii) Application to Pass Accounts.....	7-5
	(viii) Other Civil Litigation.....	7-5
	(b) As Guardian of Property or Guardian of Personal Care of an Incapable Person	7-6

TABLE OF CONTENTS

(i) Applications Under the <i>Substitute Decisions Act, 1992</i> by the Public Guardian and Trustee	7-6
(ii) Applications for Temporary Guardianship	7-7
(iii) By a Person to Replace the Public Guardian and Trustee as Statutory Guardian of Property.....	7-7
(iv) Other Actions on behalf of Incapable Persons for whom the Public Guardian and Trustee Acts as Guardian of Property.....	7-8
(c) Protecting the Interests of Incapable Persons under the <i>Substitute Decisions Act, 1992</i>	7-8
(i) Arranging Counsel.....	7-8
(ii) Reviewing Private Applications.....	7-9
(d) As Committee of an Absentee	7-9
(e) As Litigation Guardian of an Incapable Person or an Absentee.....	7-10
(i) Civil Litigation.....	7-10
(ii) Motions by Counsel under rule 15.04 ..	7-11
(f) Providing Assistance to the Superior Court under Rule 7.08(5).....	7-12
(g) Roles with respect to Charitable Property	7-12
(i) Charitable Bequests by Will	7-13
(ii) Incorporation of Charities	7-13
(iii) Complaints About Charities	7-14
(iv) Regulations and Orders under the <i>Charities Accounting Act</i>	7-14
(v) Other Estate Litigation.....	7-15
7.3 Service on the Public Guardian and Trustee	7-15
7.4 Mediation	7-18
7.5 Legal Costs	7-18
7.6 Conclusion	7-19
7.7 Case Law	7-19
(a) General.....	7-19
(b) PGT as Guardian of Property	7-22
(c) PGT as Litigation Guardian	7-28
(d) PGT's Capacity to Commence or Continue Action	7-32
(e) PGT and Charitable Organizations	7-33
APPENDICES.....	APP7-1
APP 7.1 Schedule A	APP7-1
APP 7.2 Schedule B	APP7-9
APP 7.3 Schedule C	APP7-13

TABLE OF CONTENTS

APP 7.4 Table of Concordance APP7-17

Volume 2

Chapter 8 CLAIMS AGAINST ESTATES: SUMMARY

 PROCEDURE..... 8-1

 8.1 Introduction 8-1

 8.2 Procedure..... 8-3

 8.3 Nature of the Claim..... 8-4

 8.4 Major Problem With the Summary Procedure Available..... 8-4

 8.5 Conclusion 8-4

 APPENDICES..... APP8-1

 APP 8.1 Form 75.13 Notice of Contestation APP8-1

 APP 8.2 Form 75.14 Claim Against Estate APP8-2

 APP 8.3 Table of Precedent Clauses APP8-3

Chapter 9 COURT APPOINTED GUARDIANS OF PROPERTY AND OF THE PERSON 9-1

 9.1 Introduction 9-1

 9.2 Statutory Provisions and Case Law 9-2

 (a) When Appointment Will Be Made 9-2

 (i) Capacity 9-2

 (ii) Evidence 9-3

 (iii) Capacity Assessment 9-3

 (iv) Effect of Power of Attorney 9-4

 (b) Choice of Guardian 9-5

 (i) Generally 9-5

 (ii) Guardians of the Person 9-6

 (iii) Appointment of Public Guardian and Trustee 9-7

 (c) Powers and Duties..... 9-7

 (i) Anti-Ademption 9-8

 (d) Rights Of Incapable Person’s Beneficiaries 9-8

 (e) Standard of Care..... 9-9

 (f) Compensation..... 9-10

 (i) Guardians of Property 9-10

 (ii) Guardians of the Person..... 9-10

 (g) Costs 9-11

 9.3 Procedure..... 9-11

 (a) Guardian of Property - Standard Procedure 9-11

 (i) Initial Documentation to be Prepared — Application Record 9-12

 (ii) Service of Application Record 9-14

TABLE OF CONTENTS

(iii) Response to Service of Application Record.....	9-15
(iv) Court Hearing and Judgment	9-15
(b) Guardian of Property - Summary Disposition Procedure.....	9-16
(i) Initial Documentation to be Prepared..	9-17
(ii) Applicant Involves Either Two Assessors or One Assessor and One Non-Assessor	9-18
(iii) Assessments are Conducted.....	9-19
(iv) Notice from Assessor(s).....	9-20
(v) Issue Notice of Application and Send Copies to Assessors and Non-Assessors Providing a Statement (If Applicable).....	9-20
(vi) Receipt of Statements from Assessor(s) and Non-Assessor (If Applicable).....	9-20
(vii) Preparing Application Record	9-21
(viii) Service of Application Record	9-21
(ix) Response to Service of Application Record.....	9-21
(x) Submission of Material to Judge by Registrar	9-21
(xi) Disposition by the Court	9-22
(c) Guardian of the Person - Standard Procedure.....	9-22
(i) Initial Documentation to be Prepared..	9-23
(ii) Service of Application Record	9-23
(iii) Response to Service of Application Record.....	9-24
(iv) Court Hearing and Judgment	9-24
(d) Guardian of the Person - Summary Disposition Procedure	9-25
(i) Initial Documentation to be Prepared..	9-25
(ii) Two Assessors Meet with Alleged Mentally Incapable Person.....	9-25
(iii) Assessments are Conducted.....	9-25
(iv) Notice from Assessor(s).....	9-25
(v) Issue Notice of Application and Send Copies to Assessors.....	9-25
(vi) Receipt of Statements from Assessors..	9-26
(vii) Preparing Application Record	9-26
(viii) Service of Application Record	9-26
(ix) Response to Service of Application Record.....	9-26
(x) Submission of Material to Judge by Registrar	9-26

TABLE OF CONTENTS

	(xi) Disposition by the Court	9-26
9.4	Case Law	9-26
	APPENDICES.....	APP9-1
<i>Guardian of Property</i>		
APP. 9.1	Form 14E Notice of application	APP9-1
APP. 9.2	Form 4D Affidavit	APP9-4
APP. 9.3	Form 38A Notice of appearance.....	APP9-6
APP. 9.4	Form 59B Judgment	APP9-5
APP. 9.5	Consent of applicant.....	APP9-7
APP. 9.6	Management plan - guardian of property.....	APP9-8
APP. 9.7	Management plan - precedent form.....	APP9-13
APP. 9.8	Consent of relative.....	APP9-22
APP. 9.9	Service by ordinary mail upon specified relatives	APP9-23
APP. 9.10	Form 38A Notice of appearance by s. 69(6) relative who wishes to become a party to the proceedings	APP9-24
APP. 9.11	Letter to assessor(s) - summary procedure.....	APP9-26
<i>Guardian of the Person</i>		
APP. 9.12	Guardianship plan - precedent form.....	APP9-27
APP. 9.13	Optional statement to appoint a guardian of the person	APP9-34
APP. 9.14	Headings for forms used in estate litigation	APP9-36
APP. 9.15	Table of precedent clauses	APP9-40
APP. 9.16	Concordance.....	APP9-51
<i>Flowcharts</i>		
CHART 1	Guardian of Property - Standard Procedure	CH9-2
CHART 2	Guardian of Property - Summary Disposition Procedure.....	CH9-4
CHART 3	Guardian of the Person - Standard Procedure.....	CH9-6
CHART 4	Guardian of the Person - Summary Disposition Procedure	CH9-8
<i>Chapter 10</i>	PROCEEDINGS RELATING TO THE PRESUMPTION OF DEATH.....	10-1
10.1	Introduction	10-1
10.2	<i>Declarations of Death Act, 2002</i>	10-1
	(a) Regime Before the <i>Declarations of Death</i> <i>Act, 2002</i>	10-1
	(b) Applications Under the <i>Act</i>	10-2
10.3	Other Possible Applications	10-5
	(a) Application Under the <i>Insurance Act</i>	10-5
	(b) Application Under the Rules of Civil Procedure.....	10-6

TABLE OF CONTENTS

	(c) Application Under the <i>Marriage Act</i>	10-6
10.4	Common Law Rules	10-7
	(a) Presumption of Death	10-7
	(b) Inference of Death.....	10-8
	(c) Time of Death	10-8
10.5	<i>Absentees Act</i>	10-10
10.6	<i>Canada Pension Plan</i>	10-11
	APPENDICES.....	APP10-1
APP 10.1	Form 14E Notice of application	APP10-1
APP 10.2	Form 4D Affidavit	APP10-3
APP 10.3	Form 59A Order	APP10-4
APP 10.4	Headings for forms used in estate litigation	APP10-5
APP 10.5	Table of precedent clauses	APP10-8
<i>Chapter 11</i>	PAYMENTS INTO AND OUT OF COURT	11-1
11.1	General Principles.....	11-1
11.2	Legislation Respecting Payment into Court	11-5
11.3	Payments into Court Pursuant to the <i>Insurance Act</i> (Ontario).....	11-8
11.4	The Office of the Accountant of the Superior Court of Justice.....	11-8
11.5	Payments Out of Court	11-9
11.6	Procedure in Other Jurisdictions	11-10
	APPENDICES.....	APP11-1
APP 11.1	Comparative legislation chart	APP11-1
APP 11.2	Form 4D Affidavit	APP11-6
APP 11.3	Letter to Accountant of Superior Court of Justice (enclosing payment and affidavit) (per ss. 36(6) of <i>Trustee Act</i> (Ontario)).....	APP11-7
APP 11.4	Form 14E Notice of Application.....	APP11-8
APP 11.5	Form 59A Order	APP11-10
APP 11.6	Form 37A Notice of motion	APP11-11
APP 11.7	Headings for forms used in estate litigation	APP11-12
APP 11.8	Table of precedent clauses	APP11-16
<i>Chapter 12</i>	APPLICATIONS FOR THE OPINION, ADVICE AND DIRECTION OF THE COURT	12-1
12.1	Applications Pursuant to Rule 14.05(3) of the Rules of Civil Procedures.....	12-1
12.2	Court Documents Required	12-2
12.3	Questions That May and May Not be Asked of the Court	12-4
12.4	Application Record.....	12-7
12.5	Position of the Trustee on the Application	12-7

TABLE OF CONTENTS

	12.6 Admissibility of Extrinsic Evidence	12-8
	(a) Indirect extrinsic evidence is admissible.....	12-8
	(b) Direct extrinsic evidence is generally inadmissible.....	12-9
	(c) Direct extrinsic evidence is admissible only in order to resolve an equivocation in the will	12-11
	APPENDICES.....	APP12-1
	APP 12.1 Form 14E Notice of application	APP12-1
	APP 12.2 Form 4D Affidavit	APP12-3
	APP 12.3 Factum of executor and trustee — application for interpretation.....	APP12-4
	APP 12.4 Form 59B Judgment	APP12-7
	APP 12.5 Headings for forms used in estate litigation	APP12-9
	APP 12.6 Table of precedent clauses	APP12-12
<i>Chapter 13</i>	RETIREMENT AND REMOVAL OF TRUSTEES.....	13-1
	13.1 Introduction	13-1
	13.2 Basic Concepts.....	13-1
	13.3 Renunciation	13-2
	13.4 Retirement by Deed.....	13-3
	13.5 Passing Over.....	13-4
	13.6 Court Removal	13-5
	APPENDICES.....	APP13-1
	APP 13.1 Form 14E Notice of application	APP13-1
	APP 13.2 Form 4D Affidavit	APP13-3
	APP 13.3 Form 59B Judgment	APP13-4
	APP 13.4 Form 59A Order	APP13-6
	APP 13.5 Headings used for forms in estate litigation	APP13-7
	APP 13.6 Table of precedent clauses	APP13-11
<i>Chapter 14</i>	COURT PROCEEDINGS TO ASCERTAIN HEIRS OF AN ESTATE.....	14-1
	14.1 Introduction	14-1
	14.2 Initiation of Proceedings.....	14-1
	14.3 Limitation Periods.....	14-2
	14.4 Onus of Proof and Case Law	14-2
	14.5 Pre-trial Procedure.....	14-4
	14.6 Evidentiary Issues.....	14-5
	14.7 Presumption of Paternity	14-6
	14.8 DNA Testing	14-7
	14.9 Proper Position of Personal Representative	14-8
	14.10 Post-trial Procedures	14-8
	14.11 Cost Considerations.....	14-9
	APPENDICES.....	APP14-1
	APP 14.1 Form 14E Notice of application	APP14-1
	APP 14.2 Form 4D Affidavit	APP14-3

TABLE OF CONTENTS

	APP 14.3	Form 59A Order	APP14-4
	APP 14.4	Form 55A Notice of hearing for directions.....	APP14-5
	APP 14.5	Form 55C Report on Reference (Administration of Estate)	APP14-6
	APP 14.6	Form 37A Notice of motion	APP14-8
	APP 14.7	Form 59B Judgment	APP14-9
	APP 14.8	Headings for forms used in estate litigation	APP-11
	APP 14.9	Precedent clauses for forms.....	APP-14
<i>Chapter 15</i>	VARIATIONS OF TRUSTS		15-1
	15.0	Author Information.....	15-1
	15.1	Introduction	15-1
	15.2	Methods of Varying a Trust.....	15-2
		(a) The Rule in <i>Saunders v. Vautier</i>	15-2
		(b) Power to Encroach or Resettle	15-2
		(c) Inherent Jurisdiction	15-3
		(d) <i>Trustee Act</i> Applications.....	15-3
		(e) Proceedings under s. 13 of the <i>Charities</i> <i>Accounting Act</i>	15-4
		(f) Variation of Trusts Legislation	15-5
	15.3	Criteria Relevant to Applications Under the <i>Variation of Trusts Act</i>	15-6
		(a) The Intention of the Testator/Settlor	15-6
		(b) Benefit to Minors, Unborn or Incapable Beneficiaries.....	15-7
		(c) Sufficiency of the Benefit: The “Prudent Adult” Test	15-8.1
		(d) The Court’s Discretion	15-8.1
	15.4	Practice on a Variation of Trust Application	15-9
		(a) Commencing the Application	15-9
		(b) Negotiation with the Children’s Lawyer.....	15-10
		(c) Deed of Arrangement.....	15-10
		(d) The Application and Supporting Documentation	15-12
	15.5	Case Law	15-13
	APPENDICES.....		APP15-1
	APP 15.1	Deed of Arrangement.....	APP15-1
	APP 15.2	Form 14E Notice of Application.....	APP15-5
	APP 15.3	Form 4D Affidavit	APP15-7
	APP 15.4	Form 59B Judgment	APP15-8
	APP 15.5	Headings for forms used in estate litigation	APP15-10
	APP 15.6	Precedent clauses for forms.....	APP15-13
<i>Chapter 16</i>	FAMILY LAW ACT APPLICATIONS		16-1
	16.1	Introduction	16-1

TABLE OF CONTENTS

16.2	Responsibilities of the Personal Representative of the Estate Under the FLA	16-1
16.3	Election and Consequences of Electing	16-3
	(a) Nature of the Election.....	16-3
	(b) Can the Election, Once Made, be Revoked Either by the Surviving Spouse or the Court?.....	16-4
	(c) Limitation Periods — Extensions of Time	16-6
	(d) Does Election Apply to Any Will of the Deceased Which May be Determined to be the Last Valid Will?.....	16-7
	(e) Who Can Make the Election on Behalf of the Surviving Spouse?.....	16-8
	(f) Issues Arising From the Fact that the Valuation Date is “the Date Before the Date on Which One of the Spouses Dies”	16-9
	(i) Treatment of Joint Property.....	16-9
	(ii) Life Insurance.....	16-9
	(iii) Income Tax Liability.....	16-10
	(iv) Testamentary and Administrative.....	16-11
	(g) “Property” — Does it Include an Interest in an Estate?.....	16-11
	(h) Effect of Surviving Spouse’s Election on the Interpretation of the Will.....	16-12
	(i) Which of the Beneficiaries of the Estate Bear the Liability for Equalization Payment?	16-12
16.4	Court Procedure Under the FLA	16-13
	(a) Initiation of Proceedings.....	16-13
	(i) Applications	16-13
	(ii) Actions	16-14
	(b) Specific Statements That Must be Served and Filed	16-15
	(c) Issues Before the Court — Court Orders.....	16-15
	(i) Value of Net Family Property — Type of Order.....	16-15
	(ii) Unconscionability.....	16-16
	(d) Continuation of Application by or Against Estate	16-16
	(e) Relationship Between Equalization Order and Dependant Support Order	16-17
	(f) Relationship Between Equalization Claim and Other Claimants Against the Estate.....	16-18
16.5	Issues of Title Between Spouses	16-20
16.6	Deemed Severance of Joint Tenancy in the Matrimonial Home with a Third Party	16-21

TABLE OF CONTENTS

	16.7 Support Orders	16-22
	16.8 Determination of Possession of the Matrimonial Home	16-24
	16.9 Preservation Orders	16-24
	16.10 Case Law Review	16-24
	16.11 Conclusion — Working with the SLRA and the FLA.....	16-38
	APPENDICES.....	APP16-1
	APP 16.1 Election	APP16-1
	APP 16.2 Form 37A Notice of Motion.....	APP16-2
	APP 16.3 Form 4D Affidavit	APP16-3
	APP 16.4 Form 59A Order	APP16-4
	APP 16.5 Form 14E Notice of Application.....	APP16-5
	APP 16.6 Form 59B Judgment	APP16-6
	APP 16.7 Form 14A Statement of Claim	APP16-7
	APP 16.8 Headings for Forms Used in Estate Litigation	APP16-8
	APP 16.9 Table of Precedent Clauses	APP16-12
<i>Chapter 17</i>	PROVING A LOST WILL IN COURT.....	17-1
	17.1 Introduction	17-1
	17.2 Procedure Under Rule 75.02	17-2
	17.3 Elements to be Proved.....	17-3
	(a) Due Execution	17-3
	(b) Tracing Possession.....	17-3
	(c) Rebuttal of the Presumption of Destruction	17-4
	(d) Proof of Contents of the Will.....	17-6
	APPENDICES.....	APP17-1
	APP 17.1 Form 75.5 Notice of Application for Directions	APP17-1
	APP 17.2 Form 4D Affidavit	APP17-2
	APP 17.3 Form 59A Order	APP17-3
	APP 17.4 Form 59B Judgment	APP17-4
	APP 17.5 Headings for Forms Used in Estate Litigation ..	APP17-5
	APP 17.6 Table of Precedent Clauses	APP17-8
<i>Chapter 18</i>	EVIDENCE IN ESTATE LITIGATION.....	18-1
	18.1 Introduction	18-1
	18.2 Due Execution of Will.....	18-2
	18.3 Testamentary Capacity, Undue Influence and Suspicious Circumstances.....	18-2
	18.4 Solicitor and Client Privilege.....	18-4
	18.5 Pretrial Examination of Witnesses to Will (R. 31.10 of the Rules of Civil Procedure).....	18-5

TABLE OF CONTENTS

	18.6 Interpretation of Wills - What Extrinsic Evidence is Admissible?	18-6
	18.7 Lost Will - Evidence Admissible to Rebut Presumption of Revocation	18-8
	18.8 Evidence of the Contents of a Lost Will.....	18-9
	18.9 Evidence in Dependant Support Cases.....	18-10
	18.10 Evidence in Applications for Appointment of a Guardian of Property.....	18-11
	18.11 Contested Passings of Accounts.....	18-12
	18.12 Claims Against the Estate - Corroboration.....	18-12
	18.13 Case Law	18-12.1
<i>Chapter 19</i>	COSTS IN ESTATE LITIGATION.....	19-1
	19.1 Introduction	19-1
	19.2 The Traditional Position.....	19-2
	19.3 The Former (and Short-lived) Costs Grid.....	19-3
	19.4 Current Costs Guidelines.....	19-5
	19.5 The Principle of Proportionality	19-5
	19.6 Trend of the Courts Not to Award All Costs Out of the Estate	19-6
	19.7 Challenges to the Validity of Wills	19-8
	19.8 Interpretation of Wills.....	19-16
	19.9 Dependant Support Proceedings or Will Variation.....	19-19
	19.10 Costs Awards in Other Types of Estate Litigation	19-22
	(a) Passing of Accounts.....	19-22
	(b) Guardianship.....	19-23
	(c) Disputes Between Beneficiaries	19-24
	(d) Allegations of Misconduct	19-25
	(e) Disputes Over an Estate Asset.....	19-26
	(f) Costs Ordered Against Solicitor for Estate Trustees	19-27
	19.11 Security for Costs.....	19-28
	19.12 Conclusion	19-30
	APPENDIX	APP19-1
	APP 19.1 Tariffs	APP19-1
	APP 19.2 Information for the Profession.....	APP19-4
	APP 19.3 Precedent Costs Outline.....	APP19-5
<i>Chapter 20</i>	MEDIATION OF ESTATE DISPUTES	20-1
	20.1 Introduction	20-1
	20.2 Some Fundamentals About Mediation.....	20-3
	(a) Dispute Resolution	20-3
	(b) Mediation as a Form of Dispute Resolution.....	20-3
	(c) Position-based vs. Interest-based Bargaining.....	20-4
	(d) The Mediator's Role	20-4

TABLE OF CONTENTS

	(e) The Mediation Process	20-5
	(f) Advantages of Mediation.....	20-6
	(g) When to Mediate.....	20-7
	(h) How to Get Started	20-7
	(i) “Win-Win” Results	20-8
20.3	Why Estate Disputes are Well Suited to Mediation....	20-8
20.4	Mediation Clauses in Wills	20-11
	(a) Precatory Statements.....	20-11
	(b) Forfeiture Clauses	20-11
	(c) Damage Clauses.....	20-13
	(d) Engaging the Executor	20-14
20.5	Encouraging Mediation in Resolution of Estate Disputes.....	20-15
20.6	Mandatory Mediation in Ontario.....	20-16
20.7	Conclusion	20-20
<i>Chapter 21</i>	SOLICITORS’ NEGLIGENCE IN ESTATE MATTERS...	21-1
	21.1 Potential for Liability.....	21-1
	21.2 Duty of Care	21-1
	21.3 Areas of Potential Drafting	21-2
	(a) Improper Execution of a Will.....	21-2
	(i) Suggestions to Avoid Potential Liability	21-3
	(b) Completing the Will in a Timely Manner: How Long is “Too Long”?	21-4
	(i) Suggestions to Avoid Potential Liability	21-5
	(c) Drafting Errors	21-5
	(i) Suggestions to Avoid Potential Liability	21-6
	(d) Ascertaining Capacity and Independence of the Testator; Recording and Maintaining the Evidence	21-7
	(i) Suggestions to Avoid Potential Liability	21-13
	(e) Administration of the Estate	21-14
	(i) Suggestions to Avoid Potential Liability	21-15
	(f) Estate Litigation.....	21-16
	(i) Suggestions to Avoid Potential Liability	21-16
21.4	Discoverability of Claims Against a Solicitor	21-17
21.5	Case Law	21-18
21.6	Conclusion	21-33

TABLE OF CONTENTS

<i>Chapter 22</i>	LIMITATION PERIODS IN ESTATE MATTERS	22-1
	22.1 Introduction	22-1
	22.2 The Limitations Act, 2002	22-1
	22.3 Basic and Ultimate Limitation Periods and the Rule of “Discoverability”.....	22-2
	22.4 Will Challenges	22-3
	22.5 Minors and Incapable Persons under the Limitations Act, 2002.....	22-4
	22.6 Estates Statutes and the Limitations Act, 2002.....	22-5
	(a) Estates Act.....	22-5
	(b) Estates Administration Act	22-6
	(i) Real property in estates.....	22-6
	(ii) Intestate distributions.....	22-7
	(c) Family Law Act.....	22-7
	(i) Limitations in equalization calculations.....	22-8
	(ii) Dependant’s claim for damages	22-9
	(iii) Extension of time periods	22-9
	(d) Succession Law Reform Act.....	22-10
	(e) Trustee Act.....	22-12
	22.7 Transition Provisions	22-15
	22.8 Summary of Limitations Periods.....	22-16
	22.9 Case Law	22-17
<i>Chapter 23</i>	CLAIMS BY COMMON LAW SPOUSES AND SAME-SEX PARTNERS AGAINST ESTATES	23-1
	23.1 Introduction	23-1
	23.2 Same-Sex Couples	23-1
	23.3 State of the Law in Ontario	23-2
	23.4 Common Law Spouses and Same-Sex Partners	23-3
	(a) Rights with Respect to Estates	23-3
	(b) Unjust Enrichment, Constructive Trust and Quantum Meruit Claims.....	23-5
	(c) Charter of Rights Cases — Common Law Spouses.....	23-6
	(i) Introduction	23-6
	(ii) <i>Miron v. Trudel</i>	23-7
	(iii) <i>Johnson v. Sand</i>	23-8
	(iv) <i>Walsh v. Bona</i>	23-10
	(v) <i>Droit de la famille - 091768</i>	23-13
	23.5 Paying the Costs for a Constitutional Challenge.....	23-15
	23.6 Remedies — A Hollow Victory?	23-16
	23.7 Conclusion	23-17
	APPENDIX	APP23-1
	APP 23.1 Relevant Estate Legislation	APP23-1

TABLE OF CONTENTS

<i>Chapter 24</i>	THE ESTATE TRUSTEE DURING LITIGATION.....	24-1
	24.1 Introduction	24-1
	24.2 Appointment	24-1
	(a) Law.....	24-2
	(i) Statutory Basis.....	24-2
	(ii) When Will an Estate Trustee During Litigation Be Appointed?.....	24-3
	(iii) Who Should Be Appointed? — The “Rule”.....	24-6
	(iv) The Exception.....	24-7
	(v) Alternatives to a Corporate Estate Trustee during Litigation	24-9
	(b) Procedure.....	24-9
	(i) The Motion/Application	24-9
	(ii) The Order	24-10
	(iii) The Costs.....	24-11
	(iv) The Certificate of Appointment	24-11
	24.3 Duties and Authority	24-12
	(a) Dealing with Assets	24-13
	(b) Information Gathering	24-15
	(c) Paying Debts and Liabilities.....	24-15
	(d) Assisting in Resolving the Litigation.....	24-18
	(e) Terminating of Duties	24-18
	24.4 Compensation.....	24-18
	24.5 Liability	24-20
	24.6 Conclusion	24-21
<i>Chapter 25</i>	RESULTING TRUST, UNJUST ENRICHMENT AND RELATED EQUITABLE RIGHTS AND REMEDIES IN ESTATE LITIGATION	25-1
	25.1 Introduction	25-1
	25.3 The Presumption of Advancement and the Presumption of Resulting Trust — <i>Pecore v. Pecore</i> and <i>Saylor v.</i> <i>Madsen Estate</i>	25-2
	(a) <i>Pecore v. Pecore</i>	25-3
	(b) <i>Saylor v. Madsen Estate</i>	25-5
	25.3 Unjust Enrichment	25-6
	25.4 Monetary Awards for Unjust Enrichment	25-7
	(a) Awards on the basis of <i>quantum meruit</i> : the “value received” approach	25-7
	(b) Awards on the basis of joint family venture: the “value surviving” approach.....	25-10
	25.5 Constructive Trust Awards	25-11

TABLE OF CONTENTS

25.6	Does the Beneficiary of a Constructive Trust Have Priority over Creditors of the Deceased?.....	25-12
25.7	Corroboration of Claim — Section 13	25-14
25.8	Integration of Claims of Unjust Enrichment with Dependant Support Claims	25-15
25.8 (1)	Part Performance of an Oral Contract	25-15
25.8 (2)	Proprietary Estoppel	25-17
25.9	Conclusion	25-18
	<i>Bibliography</i>	25-18
	APPENDIX	
APP 25.1	Quantum Meruit Claim.....	APP25-1
APP 25.2	Constructive Trust Claim.....	APP25-6
<i>Chapter 26</i>	CHALLENGING “JOINT WITH RIGHT OF SURVIVORSHIP” ENTITLEMENT.....	26-1
26.1	Introduction	26-1
26.2	Evidentiary Presumptions	26-2
	(a) Presumption of Resulting Trust	26-2
	(b) Presumption of Advancement.....	26-3
	(c) Presumption of Undue Influence.....	26-5
26.3	When Will The Court Apply The Presumptions	26-6
26.4	Rebutting The Presumptions	26-7
	(a) Onus of Proof.....	26-7
	(b) Standard of Proof.....	26-7
	(c) Section 13 of The <i>Evidence Act</i>	26-9
	(d) Insufficient Evidence	26-10
26.5	Beneficiary Designations.....	26-11
26.6	Procedure.....	26-12
	(a) Orders For Assistance	26-13
	(b) Passing of Accounts.....	26-13
	(c) Availability of Summary Judgment	26-14
	(d) Costs	26-14
26.7	Conclusion	26-15
<i>Chapter 27</i>	A MATTER OF OPINION: EXPERT EVIDENCE IN ESTATE LITIGATION.....	27-1
27.1	Introduction	27-1
27.2	General Considerations: Preventing Expert “Overkill”	27-2
27.3	The Expert’s Duty	27-3
27.4	The Expert’s Report	27-4
	(a) Contents	27-4
	(b) Time for Service.....	27-5
	(c) Filing the Report.....	27-6

TABLE OF CONTENTS

(d) Medical Reports.....	27-7
(e) Discoverability	27-8
27.5 The Expert	27-9
(a) Choosing an Expert	27-9
(b) Retaining the Expert.....	27-11
(c) The Expert’s Fees.....	27-11
27.6 Preparing the Expert.....	27-12
(a) Initial Stages.....	27-12
27.7 The Expert’s Evidence.....	27-13
(a) Presenting the Expert to the Court.....	27-13
(b) Direct Examination.....	27-14
(c) Cross Examination	27-14
(d) “Best Behaviour”.....	27-14
27.8 Specific Expert Evidence in Estate Litigation.....	27-15
(a) Medical Experts	27-15
(b) Forensic Experts (Document Examination).....	27-16
(c) Legal Expert Evidence.....	27-18
27.9 Conclusions	27-19

Volume 3

<i>Issues in Focus</i>	Issues-i
<i>The Effect of Scorched-Earth Litigation Clauses</i>	Issues-1
<i>The Effect of Separation Agreement Release Clauses</i>	Issues-9
<i>Whether Debt of Beneficiary to Estate Survives</i>	
<i>Declaration of Bankruptcy</i>	Issues-17
<i>Role of the Public Guardian and Trustee in circumstances</i> <i>pertaining to the determination of one’s</i> <i>mental capacity</i>	Issues-25
<i>Friction between Co-estate Trustees as a Ground for</i> <i>Removal of a Trustee</i>	Issues-38
<i>Consent for Treatment — A Patient’s Rights</i>	Issues-44
<i>Costs in Estate Litigation</i>	Issues-65
<i>Insurance Proceeds & Dependant Relief</i>	Issues-85
<i>Pension Plan Death Benefits</i>	Issues-102
<i>Power of Attorney and Accepting Gifts from Donor</i>	Issues-116
<i>Will Revocation Clauses</i>	Issues-128
<i>Spousal Equalization Election</i>	Issues-140
<i>Challenge Transferred Assets</i>	Issues-152
<i>Pre-death Will Determination</i>	Issues-170
<i>Interpretation of the Phrase “for a period of thirty days”</i> <i>When Included in the Survival Clause of a Will</i>	Issues-183

TABLE OF CONTENTS

<i>Under the Succession Law Reform Act, when will a claimant be denied the benefit of an order under the Act due to his or her character or conduct?.....</i>	Issues-192
<i>Under what circumstances will a court find that a continuing power of attorney for property is invalid due to it having been executed in circumstances of undue influence?.....</i>	Issues-197
<i>May the trustee of an estate disperse or lend monies out of the estate to an intended beneficiary before the beneficiary's interest in the estate has vested?</i>	Issues-204
<i>Circumstances Where Will Can Be Void as Against Public Policy</i>	Issues-211
<i>How will the recent Supreme Court of Canada companion appeals of Combined Air Mechanical Services Inc. v. Flesch affect summary judgment motions in Ontario estate litigation?</i>	Issues-225
<i>What are the special conditions and/or implications surrounding notarial wills in provinces outside of Quebec?</i>	Issues-239
<i>What cases have considered the duty of a trustee under a resulting trust or a constructive trust to account for the management of the beneficiary's assets and to keep proper accounts respecting same?</i>	Issues-248
<i>How have the courts considered cases under dependant's relief legislation where a common law spouse, who was financially dependant on a deceased prior to his or her death, is entitled to make a claim for support?</i>	Issues-253
<i>In view of the recent Ontario decision of Leibel v. Leibel, is it the law that unless a challenge to the validity of a will is advanced within 2 years of the date of death, the challenge will be statute-barred?</i>	Issues-269
<i>Summary of Procedures</i>	SUM-1
<i>Legislation</i>	
<i>Absentees Act.....</i>	AB-1
<i>Accumulations Act</i>	ACC-1
<i>Aliens' Real Property Act.....</i>	ARP-1
<i>Apportionment Act</i>	APP-1
<i>Charities Accounting Act.....</i>	CAA-1
<i>Children's Law Reform Act (selected provisions)</i>	CLRA-1
<i>Crown Administration of Estates Act.....</i>	CrAE-1
<i>Declarations of Death Act, 2002</i>	DDA-1
<i>Escheats Act</i>	ESCH-1

TABLE OF CONTENTS

<i>Estate Administration Tax Act, 1998</i>	EATA-1
<i>Estates Act</i>	EA-1
<i>Estates Administration Act</i>	EAA-1
<i>Evidence Act</i>	EvA-1
<i>Family Law Act and Regulation</i>	FLA-1
<i>Fraudulent Conveyances Act</i>	FCA-1
<i>Health Care Consent Act, 1996, and Regulation</i>	HCC-1

Volume 4

Legislation

<i>Insurance Act (selected provisions)</i>	INS-1
<i>Land Titles Act (selected provisions), Forms and Regulations</i>	LTA-1
<i>Limitations Act, 2002</i>	LA-1
<i>Mental Health Act, Regulations and Forms</i>	MAA-1
<i>Pension Benefits Act (selected provisions) and Regulation</i>	PBA-1
<i>Public Guardian and Trustee Act and Regulation</i>	PUB-1
<i>Real Property Limitations Act</i>	RPLA-1
<i>Settled Estates Act</i>	SEA-1
<i>Substitute Decisions Act, 1992, Regulations and Form</i>	SDA-1
<i>Succession Law Reform Act</i>	SLRA-1
<i>Trustee Act</i>	TA-1
<i>Variation of Trusts Act</i>	VTA-1
<i>Rules of Civil Procedure (selected provisions), Regulation and Forms</i>	R-1
<i>Words & Phrases</i>	WP-1
<i>Bibliography</i>	BIB-1
<i>Index</i>	IND-1