

# 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

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? <b>If the will was drafted within the 6 months prior to the date of death, please provide details on Part C.</b>								
3. Status of Probate (select one of the following): <table style="width:100%; border:none;"> <tr> <td style="width:33%;">Probate has been granted</td> <td style="width:33%;">Probate application will be filed</td> <td style="width:33%;">Probate application will not be filed</td> </tr> </table>						Probate has been granted	Probate application will be filed	Probate application will not be filed
Probate has been granted	Probate application will be filed	Probate application will not be filed						
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 outside of Canada?    Yes    No If yes, location(s) of foreign Beneficiaries:    US    Other:								

## Estate Assets

1. Estimated <b>total</b> value of estate assets: (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 (if known):					
3. Are there any business assets?    Yes    No If yes, approximate value of business assets (if known):					
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 <b>If yes, please provide details on Part C.</b>					
5. Are any assets held jointly with another party?    Yes    No    Unknown <b>If yes, please provide details on Part C.</b>					
6. Is there current and up-to-date physical damage insurance and third party liability insurance on the estate assets?    Yes    No					

## Lawyer/Notary/CEA Details

Firm Name:
Address:
Name:
Phone:
Email:

By completing this form, you acknowledge that Estate Risk Protection Plan Inc. will collect, use and disclose your personal information to third parties, including your lawyer, as necessary for underwriting purposes and to fulfill this contract in accordance with applicable legislation. You also authorize ERAssure to accept direction relative to this application and subsequent matters related to this application from the lawyer indicated on this form. For more information on why and how we collect, use and disclose your personal information, view our complete privacy statement at [www.erassure.com/important-customer-information](http://www.erassure.com/important-customer-information) or contact our Privacy Officer at [privacy@erassure.com](mailto:privacy@erassure.com).

# 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? <span style="float: right;">Yes    No</span>			
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? <span style="float: right;">Yes    No</span>			
If yes, please provide the following:			
Company Name:			
Address:			
		Street	
		City	Province/State    Postal Code
Phone Number:			
Education Level of the Estate Trustee:			
Some High School		High School	Some College/University
College/University		Graduate School	Unknown
		Other: _____	
Estate Trustee's Relationship to Decedent:			
Spouse		Child	Sibling
Parent		Other: _____	
1. Was the Estate Trustee appointed in the will? <span style="float: right;">Yes    No</span>			
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: <span style="float: right;">Yes    No</span>			
3. Was the Estate Trustee also the Power of Attorney? <span style="float: right;">Yes    No    Not Applicable</span>			
4. Is a testamentary Trust being created? <span style="float: right;">Yes    No</span>			
If yes, is the Estate Trustee also a Trustee of this Trust?		Yes	No
(Note: Trusts will require additional underwriting information)			
5. Were there any previously named Estate Trustees? <span style="float: right;">Yes    No</span>			
<b>If yes, please provide details on the circumstances that led to a new Estate Trustee being appointed on Part C.</b>			
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)? <span style="float: right;">Yes    No    <b>If yes, please provide additional details on Part C.</b></span>			

# 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    Unknown

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 Tenants in Common	Yes No
				Joint Tenancy Tenants in Common	Yes No
				Joint Tenancy Tenants in Common	Yes No

## Part B - Estate Trustee Information

5. Were there any previously named Estate Trustees?

Please provide details on the circumstances that led to a new Estate Trustee being appointed.

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)? Please provide additional details.