

**PROBATE QUESTIONNAIRE**  
**To apply for Certificate of Appointment of Estate Trustee with a Will**

**PLEASE NOTE THAT WE ARE NOT RETAINED MERELY BY VIRTUE OF YOUR COMPLETING AND/OR  
SUBMITTING THIS QUESTIONNAIRE**

Deceased

1. Name: \_\_\_\_\_
2. Also known as: \_\_\_\_\_
3. Date of Birth: \_\_\_\_\_
4. Date of Death: \_\_\_\_\_
5. Place of Death: \_\_\_\_\_
6. Fixed addressed at date of death: \_\_\_\_\_
7. SIN: \_\_\_\_\_
8. Last Occupation/Employment: \_\_\_\_\_
9. Marital Status at death: \_\_\_\_\_

Will

1. Date of Will: \_\_\_\_\_
2. Any person not applying for Estate Trustee who is entitled: \_\_\_\_\_

Estate Trustee (for each Trustee)

1. Full name: \_\_\_\_\_
2. Date of Birth: \_\_\_\_\_
3. Address and contact information: \_\_\_\_\_
4. Occupation: \_\_\_\_\_

Estate Information

5. Value of Assets at date of death owned solely by deceased:
  - a. Real Estate: CAD\$ \_\_\_\_\_
  - b. Personal Property: CAD\$ \_\_\_\_\_

Beneficiary Information (for each beneficiary)

6. Full name: \_\_\_\_\_
7. Date of Birth: \_\_\_\_\_
8. Address and contact information: \_\_\_\_\_  
\_\_\_\_\_