

Service Commitments Estate Administration Services

Estate and Personal Trust Services of the Public Guardian and Trustee offers the following service commitments with respect to the administration of an estate under our care.

1. We will investigate and determine the nature of the assets of the estate. Physical assets which are known will be secured and under our control within fifteen days of receiving the referral and advice of the death.
2. We will give instructions to Advertise for Creditors within two (2) weeks of the receipt of our authority from the Court.
3. We will communicate with proven heirs and beneficiaries advising them of the estate's assets and liabilities, outlining the next steps and estimated timelines to distribution, and provide a copy of the Service Commitments (if it has not already provided to them) within four (4) weeks of obtaining approval of the identification of heirs or beneficiaries in the case of a will.
4. We will ensure the preparation and filing of all necessary income tax returns within statutory deadlines.
5. We will send out all Releases, a full accounting and the Statement of Distribution for the estate within three (3) weeks of the approval of the Statement of Distribution.
6. We will distribute the estate to the heirs and beneficiaries within three (3) weeks of receipt of all executed Releases referred to above and completion of all tax work including the receipt of the final Tax Clearance Certificate.

If special circumstances prevent us from fulfilling any of our service commitments, those proven heirs and /or beneficiaries will be notified immediately.