

Information for Executors and Estate Trustees

Hope and Healing's Estate Administration Policy



formerly **cbm**
forever **Christian**

Legal name: Hope and Healing International

Operating as: Hope and Healing

The following is information Hope and Healing requires from the Executor(s) in order to demonstrate to third-parties, such as its external auditor, that the full wishes of the deceased have been carried out according to their Last Will and Testament.

For a Specific Bequest:

1. A copy of the Notice of Application for Certificate of Appointment of Estate Trustee with a Will or Letters Probate.
2. A copy of the pertinent portion of the Will where Hope and Healing is listed to receive the specific bequest.

For a Residual Bequest:

1. A copy of the Notice of Application for Certificate of Appointment of Estate Trustee with a Will or Letters Probate.
3. A copy of the entire Will.
4. A copy of the List of Assets and their value at date of death.
5. A copy of Executor's interim and final accounting of receipts and disbursements for revenue accounts and capital accounts.

Hope and Healing's Process for Handling Requests by Executor(s) to Vary the Will:

1. Hope and Healing will ask for the request to vary the Will to be submitted by the Executor(s) in writing along with a copy of any background documentation that the Executor(s) may have.
2. Hope and Healing will forward the estate file to Hope and Healing's legal counsel who will review the file and advise Hope and Healing on next steps.
3. Hope and Healing's lawyer will communicate either directly to the Executor(s) or to the legal counsel for the estate.

Hope and Healing's legal name is Hope and Healing International

3844 Stouffville Rd, PO Box 800, Stouffville, ON L4A 7Z9

1.800.567.2264 • info@hopeandhealing.org

Charitable Registration No. 10691 8329 RR0001