

Information for Executors and Estate Trustees

cbm Canada's Estate Administration Policy



Legal name: **Christian Blind Mission International**

Operating as: **cbm** Canada

The following is information **cbm** Canada 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 **cbm** Canada 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.

cbm Canada's Process for Handling Requests by Executor(s) to Vary the Will:

1. **cbm** Canada 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. **cbm** Canada will forward the estate file to **cbm** Canada's legal counsel who will review the file and advise **cbm** Canada on next steps.
3. **cbm** Canada's lawyer will communicate either directly to the Executor(s) or to the legal counsel for the estate.

cbm's legal name is 'Christian Blind Mission International'

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