

### Estate Administration Tax Act - Estate Information Return

As the Ontario Ministry of Finance moves forward with its oversight responsibilities of Ontario's Estate Administration Tax Act, 1998, the Ministry has asked for STEP Canada's assistance to ensure stakeholders are fully aware of the options available to them when submitting an Estate Information Return.

STEP Canada is pleased to deliver this message from the Ministry to its members.

Beginning January 1, 2015, an Estate Information Return must be received by the Ministry of Finance within 90 calendar days after a Certificate of Appointment of Estate Trustee has been issued by the court. However, this does not apply to anyone who applied to the court for a Certificate of Appointment of Estate Trustee prior to January 1, 2015.

A fillable PDF version of the [Estate Information Return](#) is available on the ministry's website, [ontario.ca/finance](http://ontario.ca/finance), under the "Forms and Publications" link on the left side. Its accompanying [Guide](#) is available on the website as well. The Estate Information Return may be filled out on-line and printed, or it may be printed and filled out by hand, before submitting it to the Ministry of Finance.

An Estate Information Return may be submitted to the Ministry of Finance in the following manner:

- by mail or courier to: Ministry of Finance, Advisory and Compliance Branch,
  - 33 King Street West, PO Box 625,  
Oshawa ON L1H 8H9, or
- by fax to: 1 866 888-3850, or
- in person to: Ministry of Finance, 33 King Street West, Oshawa ON L1H 8H9 (8:30 am to 5:00 pm, Monday to Friday).

Effective May 1, 2015, an Estate Information Return will also be accepted in person at select ServiceOntario locations. For ServiceOntario locations, hours of operation and telephone numbers, please visit [ontario.ca/serviceontario](http://ontario.ca/serviceontario) or call toll-free 1 888 745-8888 (TTY toll-free 1 800 268-7095).

If you require any additional information or have any questions please contact the Ministry of Finance at:

- 1-866-ONT-TAXS (1-866-668-8297)
- 1-800-263-7776 – Teletypewriter (TTY)
- [EstateAdminTaxProgram@ontario.ca](mailto:EstateAdminTaxProgram@ontario.ca)

STEP Canada strives to work closely with the Ontario Ministry of Finance.

**About STEP Canada:**

The Society of Trust and Estate Practitioners is the leading international organization for trust and estates professionals. Headquartered in London, England, it has more than 20,000 members worldwide in 95 countries.

**STEP Canada**, founded in 1998, has 2,200 members with branches in the following cities and regions: Atlantic, Montreal, Ottawa, Toronto, Winnipeg, Calgary, Edmonton, Vancouver and chapters in London & Southwestern Ontario, Okanagan Valley and Saskatchewan. STEP is a multi-disciplinary organization with the most experienced and senior practitioners in the field, including: lawyers, accountants, financial planners, insurance advisors and trust professionals. They provide domestic and international advice on trust and estates, including planning, administration and related taxes.

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