INDEX

Acceleration, presumption of 586-587, 669

Accounts, passing of
compensation of personal representative 54-57
generally 53-54
solicitors fees 57

Accumulations
Accumulations Act 785-787
exceeding accumulation period 800-805
excess income, destination of 796-800
generally 783
periods 787-793
rule in Saunders v. Vautier 793-794, 796
terminating 793-796

Administration, grant of 38, 39, 265

Administrator. See Estate Trustee

Advancement, presumption of 169, 186

Alienation, restraint on 527, 735-739

Appointment, certificate of 23, 28, 32, 33-34, 36-38, 44-45

Appointment, powers of
general power of 35, 61, 72, 147-152, 282, 345, 460, 530, 535-536, 568, 610, 763, 778, 820
special power of 146-148, 345, 349, 460, 610, 763, 771, 778

Assessments, capacity 960-970

Attestation. See Wills

Beneficiaries
alternative 589, 592, 594, 598, 619, 701
capacity
adoption 412-415
foreign beneficiaries 428
generally 407
homicide
generally 415-417
limits of disentitlement 421-428
nature of crime 420
problems of proof 417-419
illegitimacy 14, 97, 407-412, 487, 759
witnesses, beneficiaries as 429-436

Comparable Legislation 410, 414, 430
deceased 596, 597, 599
designated 115, 173-176, 184-187
foreign 428
intended 597-598, 927, 929-934, 940
ordinary 179
original 911
predeceasing 607
preferred 179, 423
primary 594, 598, 613-616, 676, 685, 700, 903
witness, gift to in representative capacity 433
witnesses 429-436

generally 429
supernumerary 435

Body, disposition of 58, 162

Canadian Forces 190-191, 323, 326

Capacity
age requirement 190-192
beneficiaries, of. See Beneficiaries
fraud 240
generally 189
knowledge and approval 192
lucid intervals issue 229-232
mental
date required 229-232
general insanity 192
general lack of capacity 195-204
generally 193-195
insane delusions 204-212
onus of proof 212-228
generally 212-215
suspicious circumstances 215-218
substitute decisions. See Substitute Decisions
mistake. See Mistake and rectification
timing of 229-232
testator's 49, 202, 216, 915-921
undue influence 232-240

Care decisions. See Substitute Decisions

Children. See Dependents, support of

Choice of law 270

Class gifts
artificial classes 640-643
class closing rules
class gift postponed by condition 656-661
gift to each member of class 661-663
immediate gift to class 651-653
postponed gift to class 653-656
class splitting 775
composition of class 647-650
description by number 643-646
gift nominativi vs. 634-640
nature and effect of 633
preferred class 599, 603

Codicis 284, 313

Common law relationship 17, 79, 340, 350, 857, 887, 888

Conflict of laws
estates administration and 264
generally 263
international wills 272
issues re 264
succession and
common law rules and 267
INDEX

costs and categories 266
intestate succession and 267
statutory reform 268-272
Consanguinity, degrees of 90
Consent and Capacity Board 970, 985-998
Construction, principles and rules of
admissibility of evidence 477-496
common law, approaches 477-490
legislative changes 495
testator’s intention, evidence of 490-495
Children’s Law Reform Act 409, 412
class closing rules 651
drafting errors and omissions
errors 503-506
generally 496
inaccurate description, rejection of 506-511
legislative changes 511
omissions 497-503
Edwards v. Edwards, rules 676
general principles 440-447
jurisdiction and function of courts 437-440
ordinary meaning rule 480, 483
partial intestacies 473-476
particular expressions, meaning of 463-472
specific rules 447-459
statutory rules 459-463
Contestation of claims 52-53
Contingent remainders 73, 670, 706, 753, 764, 803
Contract
annuity 120-1, 519, 796, 800 see also Life insurance
domestic 98, 812, 813, 835, 839, 882-883
to leave property by will 892-897
to make will. See Wills
Conversion
equitable doctrine 558-567 see also Testamentary gifts
Costs
court discretion re 48-51
Court
commom law and equity jurisdiction 31
probate jurisdiction 30, 32-33
role of 28-32
Death
declaration of 381, 391, 394
presumption of 31, 380-382, 386, 390,622
proof of
absentees 388-390
common law rules 380-386
Comparable Legislation 389, 393
generally 379
statutory provisions 386-388
statutory reform 390-395
Depts, payment of 3, 22, 58, 60-61, 63, 264, 282,
430, 457, 515, 528-530, 536, 760, 786, 811, 813,
837, 871
Dependants, support of
current model of law, genesis of 852
family provision 851
limitation periods 868
litigation, preservation of estate during 869-871
orders
change in circumstances 910-912
content of 908-910
generally 905
interim orders 906-907
property subject to. See property subject to order
suspensory orders 906
practice and procedure 866-868
property subject to order
contracts to leave property by will 892-897
property falling into estate 897-905
support obligations, satisfaction of
children 889-891
generally 871-876
“inadequate provision” 876-882
parents 891
rationalization principles 853-866
spouses 883-889
waiver 882
“testamentary freedom” and 849-851
Dependent relative revocation, doctrine of 369-373
Devolution of Property 72
Duties, moral 333, 855-856, 859, 862, 865, 880,
883, 894
Election 572-576 see also Wills, revocation
Equitable executory interests 765
Equitable Relief
proprietary estoppel 125
quantum meruit 122-125
Errors, clerical. See Construction, principles and rules of
Estate, beneficiary’s 113, 140, 142, 458, 589,
607
Estate Trustee, see also Grants, obtaining
adminisrator 37-40
administrator with will annexed 39
ancillary grants 43
application procedure
contentious proceedings 46
letters of administration 44
letters probate 44
method of 46
summary judgment 47
INDEX

certificate of appointment 23, 28, 32, 33-34, 36-38, 44-45
definitions 22
estate trustee with a will 36
estate trustee without a will 37-39
executor 36
executor de son tort 41
litigation administrator 40
resealing of appointment 44
role of the courts 28
types of 36-41
Evidence, admissibility. See Construction, principles and rules of
Executors see Estate Trustee
de son Tort 41
Expressions, meaning of 463-472
Gifts, see also Testamentary gifts; Vested interests
alternative 589, 603, 610, 611, 613
class. See Class gifts
demonstrative 519-523
immediate 651-653, 656, 661, 677, 754
gift over on death 676
postponed 653-661
Gifts mortis causa 166, 897, 899, 904
Gifts nominatim 451, 634-640
Grants, obtaining
ancillary grants 43
costs 48-51
procedure 44-48
purpose 32-34
resealing 44
special types 41-43
time lapse 34-35
types of estate trustees 35-41
Guardian. See Substitute Decisions
Guardians and custodians, testamentary 274-277
Guardianship 31, 68, 275-277
Hedley Byrne principle 923-937
Holograph will. See Wills
Immovables 274, 342
Incapacity, see also Capacity; Substitute Decisions
certificate of 973
disabled dependent 867
lost will 396
testator’s 193
Incorporation by reference 136-142, 313-316
Independent children, adult 861, 889, 890-891

Intention
direct evidence of 244, 250, 352, 362, 438, 477-479, 487, 490-495
dominant 444, 645
final 304, 307, 527
general 443, 484, 777
general charitable 585, 612, 767
particular 443, 767
settled 79, 871, 889, 971
subjective 479, 481, 484, 606, 618
ture 439, 479, 483
Inter vivos trusts 14, 166-168, 186, 476
Interdependent Relationships, Adult 18, 889
Interpretation. See Construction, principles and rules of
Intestacies, partial 13, 76, 77, 98, 104, 426, 473-476, 585, 813
Intestate Succession, see also Shares
advancement 102-104
Comparable Legislation 72
contracting out of legislation 98-101
devolution of property 72
distribution on intestacy 73-97
adoption 97
ascendants and collaterals 89-96
common deaths 97
descendants 85-89
illegitimacy 97
spouses and partners 75-85
table of consanguinity 90
generally 73
partial intestacy 98
spousal disentitlement 84
Issue, die without 461, 706
Lapse
anti-lapse legislation 594-603
contrary intention 600-603
generally 594-600
charities 612
class gifts, 619-622
Comparable Legislation 590, 595, 604, 626, 627
disposition of lapse gift 589-594
dissolved corporations 611
exceptions 603-610
class gift 610
fulfillment of moral obligation, 607-610
joint tenancy 603-607
powers of appointment 610
secret trust 612
substitutionary gifts 613-622
survivorship 622-631
B.C. specific rules 629-631
common law rules 622
generally 622
statutory rules 623-628
INDEX

Lapsed gift, disposition of 589
Law, uniform 13, 272, 321, 326-330
Laws rules, conflict of 264, 271
Life, measuring 770-776
Life insurance 21, 172-175, 184, 187, 386, 390, 416, 570, 623, 626-627, 812, 814, 827, 832, 1002
Limitation period
creditor’s action 52
right to trace 411
support of dependants 868-871
Limitations, ulterior 768
Lost wills, proof of 395-403
Marriage, contemplation of 190, 333, 337-342, 344 see also Wills
Mistake and rectification
court of probate, jurisdiction of 243-248
drafting errors 250-258
extection of wrong instrument 259-261
generally 243
patent mistakes 149
statutory modifications 248
Models, statutory formula 770-773 see also Perpetuities
Moral obligations, doctrine of 607-610, 855-856, 860, 862-863, 865, 877, 888
Movables 273-274, 342
Partners, same-sex 16-17, 19, 448, 822, 843, 908
Paternity
declaratory orders 410
DNA testing 410
presumption of 14, 410
Pensions
beneficiary designation 13, 16, 175-185, 904
benefits 114-115, 175-185, 812, 816, 830-833, 842, 845
Perpetuities
application to various interests, administrative
powers and trusts 767, 781
class gifts 761
contingent remainders 764
equitable executory interests 765
gifts to charity 767
interim income, 780
legal executory interests 765
possibilities of reverter 766, 779
powers of appointment 762-764, 778
rights of entry for condition broken 766, 779
ulterior limitations 768, 781
common law rule against 755-768
history of 751
perpetuity period 755-760, 769
rule in Whitby v. Mitchell 752, 753, 768
rule against indefinite duration 754
rule against under statute 768-782
application to various interests 778-781
measuring lives 770-773
modification of rule against indefinite duration 781
perpetuity period 769
specific reforms 773-777
age reduction 774
capacity to have children 773
class splitting 775
cy-pres 777
order of remedies 777
unborn spouse 776
wait and see principle 769
Person, incapable. See Capacity, Incapacity; Substitute Decisions
Personal representatives
actions by/against estate 58
advertise for creditors 52
compensation 57
disposition of deceased’s body 58
distribution of estate 66-68
duties of 58-68
establishing trusts 58, 66
generally 58
income tax 59
passing of accounts 54-57
payment of debts 60-61
sale of real property
generally 61
powers of sale 62-65
sale by beneficiaries 65
sale of minors’ lands 66
substitute 625-626
Power of Attorney. See Substitute Decisions
Power of testation, limits 153-162
Probate
common form 44-5
contingent 46
history of 7
solemn form 44-46
Property
devolution of 72 see also Intestate Succession
guardian of. See Substitute decisions
power of attorney for. See Substitute decisions
statutory guardianship of 973-981
Proprietary estoppel, doctrine of 125
Purpose trusts, non-charitable 147, 407, 723,754, 781
Renvoi, elimination of 270
Resulting trust, presumption of 168-171, 187, 817
Reverter 73, 166, 766, 779-780
Revival 317, 322, 373-377, 611
Revocation clause 145, 184, 352, 355, 372
conditional 249, 367-373
implied 352, 354-355
presumption of 348, 373, 376
Rule, public policy 71, 416, 420, 425-428, 628, 713, 837
Rules of construction. See Construction, principles and rules of
Rules of convenience 647-648, 656, 661
Shares
distributive 14, 76, 77, 81, 83, 85
preferential 10, 13, 39, 76-77, 80-81, 85, 98, 267, 597
Solicitor
duties
beneficiaries, duty of care to 922-941
taking instructions 915-922
Spousal Rights
Comparable Legislation 817
dower, curtesy and homestead rights 846
Family Law Act (Ontario) 810
explication of provisions 819-842
overview of statutory scheme 817-819
provisions of 811-817
generally, 809
legislation in other provinces 843 matrimonial home, rights in 845
matrimonial property 809
Spouses
distribution on intestacy 75-85
same-sex 16-17, 19, 448, 822, 843, 908
support. See Dependents, support of unborn 760
Statutory guardian 114, 973-981
Substitute Decisions
capacity and incapacity
capacity assessment 960-970
capacity to grant continuing power of attorney 959
generally 953-959
incapacity finding, challenging 970
continuing powers of attorney 115, 174, 567, 970-973, 1002
enduring powers of attorney 241, 528, 581, 952, 971
generally 945
guardians 973-981
court-appointed 973
statutory 973-981
history 946-950
legislation in other provinces 950-952
Ontario statutes, terminology and scheme of 952
power of attorney, generally 184, 333, 834
power of attorney, historical perspective 946-949
powers of attorney/guardians, powers and obligations
conditions and restrictions 971
continuing powers of attorney 970-973
duty of care 981
fiduciary duties 981
personal care 982-999
property management
compensation 1004
duty to account 1004
generally 1000
records, maintenance of 1003
sources of law 950-952
substitute decision maker, historical perspective 949
Succession
constitutional issues 3, 16-19
Indian Act 19-21 law of, history 3-15
Terms defined 21-23
Summary Judgment 47, 212, 238
Survivorship. See Lapse
Suspicious circumstances, doctrine of 50, 51, 183, 192, 215-228, 366 see also Capacity, mental
Testamentary capacity see capacity
Testamentary gifts
abatement 528-537
ademption 538-541
appurtenances 568
Comparable Legislation 542, 564, 569, 583
conversion, equitable doctrine of 558-567
generally 558-561
options 561
republication 562-564
statutory reform 564-567
date from which will speaks 542-558
change in name and form 550-558
contrary intention 545-550
general rule 542-545
demonstrative gift 519-523
disclaimer 583-587
election, doctrine of 572-576
encumbered property 568-572
presumptions 572-583
abolition 582
double portions, rule against 578-582
election 572-576
generally 572
satisfaction 576-578
real property subject to mortgage 568-572
residuary gift 526-528
INDEX

rule against double portions 578-582
satisfaction 576-578
scope 513
specific gift 523-526
subject matter 513-515
types, 515-528
demonstrative 519-523
general and pecuniary 516-519
generally 515
residuary 526-528
specific 523-526

Testamentary Guardians and Custodians 274-277
Comparable Legislation 276

Testamentary power, delegation of 146-153

Trust
constructive 16, 123, 126-128, 141, 576, 833, 855, 862
resulting 16, 168-171, 187, 238, 463, 767, 779, 817
presumption of 168-171, 187, 817

Trustees, constructive 128, 423

Trusts
discretionary 823
inter vivos 14, 21, 134, 141, 166-168, 476, 514, 722, 760
semi-secret 141-142

Uniform Wills Act 151, 268, 321, 556, 594

Vested interests, see also Perpetuities
conditions of acquisition vs. retention 670
generally 666-672
vested and contingent gifts
background to 666
meanings and distinctions 667-672
remoteness of vesting, rule against 669
vesting
Boraston’s Case, rule in 706
common law remainder rules 706
convenience of estate rule 688-695
general principles of 672-676
gifts over on death before receipt 685-687
gifts over on death generally 676
postponed payment 695-700
presumptions re 672-676
specific principles 676-707
survivorship 701-706

Void conditions
conditions contrary to public policy 713-739
conditions impossible of performance 739-743
consequences of 710-713
generally 709
uncertain conditions 743-749

Will substitutes
deeds and inter vivos trusts 166
generally 165
gifts inter vivos 165
gifts mortis causa 166
joint interests 168-171
life insurance 172-175
pensions and beneficiary designations 175-185
probate fee avoidance through 185-188

Wills
attestation
acknowledgment 298-301
by beneficiaries and others 301-303
generally 295-298
attested wills
at end of will 290-295
generally 279
in writing 285
sample codicil 284
sample will 282-284
signed by testator or amanuensis 286-290
body parts, disposition of 162
conditional 142-146
construction of. See Construction, principles and rules of
contracts to make
generally 116
part performance 121
remedies for breach 117-120
deligation of testamentary power 146-153
dispensal/validating power 316-320
electronic wills 320-323

holograph 13, 45, 138, 191, 272, 259, 272

codicils 313
Comparable Legislation 304
deliberate/final and fixed intention 304-307
formalities 310-313
generally 303
incorporation by reference 313-316
intention 304-307
printed wills 308-310
incorporation by reference 136-142, 313-316
international 13, 272, 326-330
Comparable Legislation 330
limits on power of testation 153-162
lost 395-403
generally 395
presumption re 396-397
probate in part 397

made in contemplation of marriage 337-342
mistake and rectification of. See Mistake and
rectification
mutual 126-136
nature of, generally 107-112
privileged 12, 191, 323-326
Comparable Legislation 323
reciprocal 126, 134-135, 259, 443, 839, 881
revocation. Comparable Legislation 333, 337, 343, 345, 349, 352, 356
revocation of
by act of testator 351-362
INDEX

by alterations 362-366
by dissolution of marriage 348-351
by marriage 333-348
conditional 367-373
election 342
operation of law 332
vitiating factors 331
revoked, revival of 373-377
spes successionis and 113-116, 514, 515, 585, 935
void conditions. See Void conditions

Witnesses
at testing 280, 295, 362, 430, 923
independent 399, 436