|  |  |  |  |
| --- | --- | --- | --- |
| **Notice to Public Trustee** | |  | Court File Number |
|  |  |  | {{estate.court\_file}} |
| Court | **Court of Queen’s Bench of Alberta (Surrogate Matter)** |  |  |
|  | **Clerk’s Stamp** |
| Judicial Centre | **{{estate.centre}}** |  |
| Estate Name | **{{deceased.name}}{% if deceased.aka\_name and deceased.aka\_name|length > 0 %} also known as {{deceased.aka\_name|merge(“a, b and c”)}}{% endif %}** |  |
| Date of Death | **{{deceased.death\_date|toDate(“1990-12-31”)}}** |  |
| Address for Service and Contact Information for Party Filing this Document | Address   |  | | --- | | **{{firm\_name}}{% if firm\_name2 %}, {{firm\_name2}}{% endif %}**  **{{office.street}}** |   City or Town Province Postal Code   |  |  |  |  |  | | --- | --- | --- | --- | --- | | **{{office.city}}** |  | **AB** |  | **{{office.postal}}** |   Phone Email Address   |  |  |  | | --- | --- | --- | | **{{lawyer.phone}}** |  | **{{lawyer.email}}** | |  |
|  |
|  |
|  |
|  | | | |

The Public Trustee is given notice that a grant has been applied for by the {{cfa.prs\_plural|text\_merge(“Applicant/Applicants”)}} shown in the attached grant application (Form GA1).

1. **Beneficiaries and intended recipients of void or revoked gifts**

**Represented adult beneficiaries for whom the Public Trustee acts as trustee**

The Public Trustee is being notified because the Public Trustee acts as trustee for the following represented adult who has an interest or potential interest in the Deceased’s estate, either as a beneficiary or as the intended recipient of a void or revoked gift.

{%p if any\_dep\_adult\_bens %}

Not applicable

{%p for party in dep\_adult\_bens\_list %}

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Legal First Name |  | Legal Middle Name |  | Legal Last Name |
| **{{party.first\_name}}** |  | **{{party.middle\_name}}** |  | **{{party.last\_name}}** |

|  |  |
| --- | --- |
| Name in Will (if different than above) | {% if party.aka\_name\_in\_will|length > 0 %}{% else %} {% endif %} Not applicable |
| **{{party.aka\_name\_in\_will|merge(“a, b and c”)}}** | |

|  |  |
| --- | --- |
| **Person’s Interest in Estate** | |
| {% if “N” in party.ben\_code%}{% else %}{% endif %} Beneficiary of a non-residuary gift  {% if “R” in party.ben\_code%}{% else %}{% endif %} Residuary beneficiary  {% if “I” in party.ben\_code%}{% else %}{% endif %} Beneficiary on intestacy | {% if party.void\_gift%}{% else %}{% endif %} Intended recipient of void gift  {% if party.revoked\_gift%}{% else %}{% endif %} Intended recipient of revoked gift |

{%p endfor %}

{%p else %}

Not applicable

{%p endif %}

**Minor beneficiaries**

The Public Trustee is being notified because the following person was a minor on the date of the Deceased’s death and has an interest or potential interest in the Deceased’s estate, either as a beneficiary or as the intended recipient of a void or revoked gift.

{%p if any\_minor\_bens %}

Not applicable

{%p for party in minor\_ben\_list %}

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Minor’s Legal First Name |  | Minor’s Legal Middle Name |  | Minor’s Legal Last Name |
| **{{party.first\_name}}** |  | **{{party.middle\_name}}** |  | **{{party.last\_name}}** |

|  |  |
| --- | --- |
| Name in Will (if different than above) | {% if party.aka\_name\_in\_will|length > 0 %}{% else %} {% endif %} Not applicable |
| **{{party.aka\_name\_in\_will|merge(“a, b and c”)}}** | |

|  |  |
| --- | --- |
| Minor’s Date of Birth yyyy-mm-dd |  |
| **{{party.date\_of\_birth|toDate(“1990-12-31”)}}** |  |

|  |  |
| --- | --- |
| **Person’s Interest in Estate** | |
| {% if “N” in party.ben\_code%}{% else %}{% endif %} Beneficiary of a non-residuary gift  {% if “R” in party.ben\_code%}{% else %}{% endif %} Residuary beneficiary  {% if “I” in party.ben\_code%}{% else %}{% endif %} Beneficiary on intestacy | {% if party.void\_gift%}{% else %}{% endif %} Intended recipient of void gift  {% if party.revoked\_gift%}{% else %}{% endif %} Intended recipient of revoked gift |

{%p endfor %}

{%p else %}

Not applicable

{%p endif %}

**Missing persons**

The Public Trustee is being notified because the following person, who has been declared to be a missing person by an order of the Court under the *Public Trustee Act*, has an interest or potential interest in the Deceased’s estate as a potential claimant, beneficiary or intended recipient of a void or revoked gift.

{%p if any\_parties\_declared\_missing %}

Not applicable

{%p for party in missing\_parties\_list %}

**Missing Person {{loop.index}}**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Legal First Name |  | Legal Middle Name |  | Legal Last Name |
| **{{party.first\_name}}** |  | **{{party.middle\_name}}** |  | **{{party.last\_name}}** |

|  |  |  |
| --- | --- | --- |
| **Person’s Interest in Estate** | | |
| {% if party.claimant\_act in [“WSA”, “Both”] %}{% else %}{% endif %} Potential claimant – *Wills and Succession Act*  {% if party.claimant\_act in [“FPA”, “Both”] %}{% else %}{% endif %} Potential claimant – *Family Property Act*  {% if “N” in party.ben\_code%}{% else %}{% endif %} Beneficiary of a non-residuary gift | {% if “R” in party.ben\_code%}{% else %}{% endif %} Residuary beneficiary  {% if “I” in party.ben\_code%}{% else %}{% endif %} Beneficiary on intestacy  {% if party.void\_gift%}{% else %}{% endif %} Intended recipient of void gift | {% if party.revoked\_gift%}{% else %}{% endif %} Intended recipient of revoked gift |

{%p endfor %}

{%p else %}

Not applicable

{%p endif %}

1. **Persons with potential claims against the estate**

**Part 5 of the *Wills and Succession Act* – represented adults**

The Public Trustee is being notified because the Public Trustee acts as trustee for the estates of the following represented adults who are potential claimants by reason of being family members for the purposes of Part 5 of the *Wills and Succession Act*.

{%p if any\_wsa\_claimants %}

Not applicable

{%p for party in wsa\_claimant\_list %}

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Legal First Name |  | Legal Middle Name |  | Legal Last Name |
| **{{party.first\_name}}** |  | **{{party.middle\_name}}** |  | **{{party.last\_name}}** |

|  |  |
| --- | --- |
| Name in Will (if different than above) | {% if party.aka\_name\_in\_will|length > 0 %}{% else %}{% endif %} Not applicable |
| **{{party.aka\_name\_in\_will|merge(“a, b and c”)}}** | |

|  |  |
| --- | --- |
| **Relationship to the Deceased** | |
| {% if party.relationship and “Spouse” in party.relationship %}{% else %}{% endif %} Spouse  {% if party.relationship in [“Grandchild”, “Grandson”, “Granddaughter”] %}{% else %}{% endif %} Grandchild  {% if party.relationship in [“Great-Grandchild”, “Great-Grandson”, “Great-Granddaughter”] %}{% else %}{% endif %} Great-Grandchild | {% if party.relationship in [“Child”, “Son”, “Daughter”] %}{% else %}{% endif %} Child  {% if party.relationship and “Adult Interdependent Partner” in party.relationship %}{% else %}{% endif %} Adult Interdependent Partner |

{%p endfor %}

{%p else %}

Not applicable

{%p endif %}

**Part 5 of the *Wills and Succession Act* – minors**

{%p if any\_minor\_wsa\_claimants %}

Not applicable

{%p for party in minor\_wsa\_claimant\_list %}

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Legal First Name |  | Legal Middle Name |  | Legal Last Name |
| **{{party.first\_name}}** |  | **{{party.middle\_name}}** |  | **{{party.last\_name}}** |

|  |  |
| --- | --- |
| Name in Will (if different than above) | {% if party.aka\_name\_in\_will|length > 0 %}{% else %}{% endif %} Not applicable |
| **{{party.aka\_name\_in\_will|merge(“a, b and c”)}}** | |

|  |  |
| --- | --- |
| **Relationship to the Deceased** | |
| {% if party.relationship and “Spouse” in party.relationship %}{% else %}{% endif %} Spouse  {% if party.relationship in [“Grandchild”, “Grandson”, “Granddaughter”] %}{% else %}{% endif %} Grandchild  {% if party.relationship in [“Great-Grandchild”, “Great-Grandson”, “Great-Granddaughter”] %}{% else %}{% endif %} Great-Grandchild | {% if party.relationship in [“Child”, “Son”, “Daughter”] %}{% else %}{% endif %} Child  {% if party.relationship and “Adult Interdependent Partner” in party.relationship %}{% else %}{% endif %} Adult Interdependent Partner |

{%p endfor %}

{%p else %}

Not applicable

{%p endif %}

***Family Property Act***

The Public Trustee is being notified because the Public Trustee acts as trustee for the estates of the following represented adults who are potential claimants by reason of being a spouse, former spouse, adult interdependent partner or former adult interdependent partner of the Deceased for the purposes of the *Family Property Act*.

{%p if any\_fpa\_claimants %}

Not applicable

{%p for party in fpa\_claimant\_list %}

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Legal First Name |  | Legal Middle Name |  | Legal Last Name |
| **{{party.first\_name}}** |  | **{{party.middle\_name}}** |  | **{{party.last\_name}}** |

|  |  |
| --- | --- |
| Name in Will (if different than above) | {% if party.aka\_name\_in\_will|length > 0 %}{% else %}{% endif %} Not applicable |
| **{{party.aka\_name\_in\_will|merge(“a, b and c”)}}** | |

|  |  |
| --- | --- |
| **Relationship to the Deceased** | |
| {% if party.relationship and “Spouse” in party.relationship %}{% else %}{% endif %} Spouse  {% if party.relationship in [“Grandchild”, “Grandson”, “Granddaughter”] %}{% else %}{% endif %} Grandchild  {% if party.relationship in [“Great-Grandchild”, “Great-Grandson”, “Great-Granddaughter”] %}{% else %}{% endif %} Great-Grandchild | {% if party.relationship in [“Child”, “Son”, “Daughter”] %}{% else %}{% endif %} Child  {% if party.relationship and “Adult Interdependent Partner” in party.relationship %}{% else %}{% endif %} Adult Interdependent Partner |

{%p endfor %}

{%p else %}

Not applicable

{%p endif %}

{%p for party in active\_pr\_list %}

{%p for sig in party.signer\_list %}

|  |  |  |
| --- | --- | --- |
| Applicant  {{sig}} |  | Date yyyy-mm-dd |

{%p endfor %}

{%p endfor %}

**Office of the Public Trustee acknowledgement to the Court of Queen’s Bench of Alberta and to the Applicant(s):**

The Public Trustee

does not intend to be represented on the grant application.

intends to be represented on the grant application.

The Public Trustee confirms the following, as applicable:

Any property to which a minor is entitled from the estate must be delivered to the Public Trustee.

Clause of the will appoints

as trustee of money or property to which the minor,

is entitled under the will. The will does not appoint the Public Trustee to monitor on behalf of the minor. Accordingly, the Public Trustee will not monitor the trustee on behalf of the minor unless the Court directs the Public Trustee to monitor pursuant to section 22 of the *Public Trustee Act*.

Clause of the will appoints

as trustee of money or property to which the minor,

is entitled under the will and clause appoints the Public Trustee to monitor on behalf of the minor. Accordingly, the Public Trustee will monitor the trustee on behalf of the minor.

The Public Trustee reserves the right to apply under the provisions of Part 5, Division 2 of the *Wills and Succession Act* on behalf of .

|  |  |  |
| --- | --- | --- |
| Public Trustee of Alberta |  | Date yyyy-mm-dd |

The Court of Queen’s Bench requires submissions to be made as to whether the Public Trustee should monitor the trust for the benefit of minor beneficiaries. Either the Applicant(s) or the Public Trustee, on notice to the other, must arrange for the Court to hear the submissions.

|  |  |  |
| --- | --- | --- |
| Justice of the Court of Queen’s Bench of Alberta |  | Date yyyy-mm-dd |