|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| {%tr if party.party\_type == “Person” %} | | | | |
| Legal First Name |  | Legal Middle Name |  | Legal Last Name |
| **{{party.first\_name}}** |  | **{{party.middle\_name}}** |  | **{{party.last\_name}}** |
| {%tr else %} | | | | |
| Legal Name | | | | |
| **{{party.full\_name}}** | | | | |
| {%tr endif %} | | | | |

|  |  |
| --- | --- |
| {%tr if party.aka\_name\_in\_will and party.ben\_code != “I” %} | |
| Name in Will (if different than above) | Not applicable |
| **{{party.aka\_name\_in\_will|merge (“a, b, and c”)}}** | |
| {%tr elif party.ben\_code != “I” %} | |
| Name in Will (if different than above) | Not applicable |
|  | |
| {%tr else %} | |
| Relationship to Deceased | |
|  | |
| {%tr endif %} | |

{%p if loop == “Non-Res” %}

{%p for gift in party.non\_res\_gift\_list %}

|  |
| --- |
| Gift |
| **{{gift.gift}}** |

Has this gift adeemed? {% if gift.adeemed %} Yes  No{% else %}  Yes  No {% endif %}

A gift has adeemed if it has been sold, given away, converted or destroyed during the lifetime of the deceased.

{%p endfor %}

{%p elif loop in [“Res”, “Int”] %}

|  |
| --- |
| Gift |
| **{{party.residual\_gift}}**{% if party.residual\_trust %} (**{{party.residual\_trust}}**){% endif %} |

{%p elif loop in [“Void”, “Revoked”] %}

{%p for gift in party.gift\_list %}

|  |
| --- |
| Gift |
| **{{gift.gift}}**{% if gift.trust %} (**{{gift.trust}}**){% endif %} |

{%p endfor %}

{%p endif %}

{%p if loop == “Int” %}

|  |
| --- |
| Applicable section of the *Wills and Succession Act* |
| **{{party.t\_beneficiaries.section\_num}}** |

{%p endif %}

{%p if party.financial\_decisions %}

Does this person have capacity to make decisions respecting financial matters?  Yes  No

If the person lacks capacity, is this person represented by either an attorney or trustee?

Yes – by an attorney  Yes – by a trustee  No Notice is to be served on the person’s attorney or trustee.

|  |  |
| --- | --- |
| Name of Attorney or Trustee | Not applicable |
|  | |

{%p else %}

Does this person have capacity to make decisions respecting financial matters?  Yes  No

If the person lacks capacity, is this person represented by either an attorney or trustee?

{%p if party.send\_notices == “Attorney” %}

Yes – by an attorney  Yes – by a trustee  No Notice is to be served on the person’s attorney or trustee.

{%p elif party.send\_notices == “Trustee” %}

Yes – by an attorney  Yes – by a trustee  No Notice is to be served on the person’s attorney or trustee.

{%p else %}

Yes – by an attorney  Yes – by a trustee  No Notice is to be served on the person’s attorney or trustee.

{%p endif %}

|  |  |
| --- | --- |
| Name of Attorney or Trustee | Not applicable |
| **{% if party.send\_notices in [“Attorney”, “Trustee”] %}{{party.notice\_name}}{% endif %}** | |

{%p endif %}

Was this beneficiary a minor on the Deceased’s date of death? {% if party.minor\_at\_dod %} Yes  No{% else %}  Yes  No {% endif %}

If “yes”, notice is to be served on the Public Trustee (Form GA4).

Is this beneficiary still a minor? {% if party.is\_minor %} Yes  No{% else %}  Yes  No {% endif %}If “yes”, notice is to be served on the minor’s guardian(s) (Form GA3).

{%p if party.t\_notices.no\_capacity != True %}

Does this person have the legal capacity to be served?  Yes  No If “yes”, provide the complete address for service below.

**Complete Address for Service**

{%p if party.send\_notices == “Attorney” %}

This is the beneficiary’s address.  This is the attorney’s address.

This is the trustee’s address.  This person cannot be located.

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Address |  | City or Town |  | Province |  | Postal Code |
| **{{party.notice\_street}}** |  | **{{party.notice\_city}}** |  | **{{party.notice\_prov}}** |  | **{{party.notice\_postal}}** |

**Email Address**

This is the beneficiary’s email address.  This is the attorney’s email address.

This is the trustee’s email address.

|  |
| --- |
| Email Address |
| **{{party.notice\_email}}** |

{%p elif party.send\_notices == “Trustee” %}

This is the beneficiary’s address.  This is the attorney’s address.

This is the trustee’s address.  This person cannot be located.

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Address |  | City or Town |  | Province |  | Postal Code |
| **{{party.notice\_street}}** |  | **{{party.notice\_city}}** |  | **{{party.notice\_prov}}** |  | **{{party.notice\_postal}}** |

**Email Address**

This is the beneficiary’s email address.  This is the attorney’s email address.

This is the trustee’s email address.

|  |
| --- |
| Email Address |
| **{{party.notice\_email}}** |

{%p elif party.t\_notices.cannot\_locate %}

This is the beneficiary’s address.  This is the attorney’s address.

This is the trustee’s address.  This person cannot be located.

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Address |  | City or Town |  | Province |  | Postal Code |
|  |  |  |  |  |  |  |

**Email Address**

This is the beneficiary’s email address.  This is the attorney’s email address.

This is the trustee’s email address.

|  |
| --- |
| Email Address |
|  |

{%p else %}

This is the beneficiary’s address.  This is the attorney’s address.

This is the trustee’s address.  This person cannot be located.

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Address |  | City or Town |  | Province |  | Postal Code |
| **{{party.notice\_street}}** |  | **{{party.notice\_city}}** |  | **{{party.notice\_prov}}** |  | **{{party.notice\_postal}}** |

**Email Address**

This is the beneficiary’s email address.  This is the attorney’s email address.

This is the trustee’s email address.

|  |
| --- |
| Email Address |
| **{{party.notice\_email}}** |

{%p endif %}

{%p else %}

Does this person have the legal capacity to be served?  Yes  No If “yes”, provide the complete address for service below.

**Complete Address for Service**

This is the beneficiary’s address.  This is the attorney’s address.

This is the trustee’s address.  This person cannot be located.

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Address |  | City or Town |  | Province |  | Postal Code |
|  |  |  |  |  |  |  |

**Email Address**

This is the beneficiary’s email address.  This is the attorney’s email address.

This is the trustee’s email address.

|  |
| --- |
| Email Address |
|  |

{%p endif %}