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

{% if party.is\_ben %}{% else %}{% endif %} Also a beneficiary {% if loop in [“spouse”, “aip”, “ment\_da”] %}{% if party.is\_sole\_ben %}{% else %}{% endif %} Receives entire estate{% endif %}

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

{%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 {{party.type}}’s address.  This is the trustee’s address. | This is the attorney’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 {{party.type}}’s email address.  This is the trustee’s email address. | This is the attorney’s email address. |

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

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

|  |  |
| --- | --- |
| This is the {{party.type}}’s address.  This is the trustee’s address. | This is the attorney’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 {{party.type}}’s email address.  This is the trustee’s email address. | This is the attorney’s email address. |

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

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

|  |  |
| --- | --- |
| This is the {{party.type}}’s address.  This is the trustee’s address. | This is the attorney’s address.  This person cannot be located. |

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

**Email Address**

|  |  |
| --- | --- |
| This is the {{party.type}}’s email address.  This is the trustee’s email address. | This is the attorney’s email address. |

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

{%p else %}

|  |  |
| --- | --- |
| This is the {{party.type}}’s address.  This is the trustee’s address. | This is the attorney’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 {{party.type}}’s email address.  This is the trustee’s email address. | This is the attorney’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 {{party.type}}’s address.  This is the trustee’s address. | This is the attorney’s address.  This person cannot be located. |

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

**Email Address**

This is the {{party.type}}’s email address.  This is the attorney’s email address.

This is the trustee’s email address.

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

{%p endif %}