{{p letter\_date\_insert}}

{%p if cfa.multiple\_prs == “Singular” %}

{% if active\_pr\_list[0].relationship == "Trust Company" %}{{active\_pr\_list[0].trust\_company\_and\_contact\_te}}{% else %}{{active\_pr\_list[0].name\_on\_file}}{% endif %}

{{active\_pr\_list[0].address\_on\_file}}

Dear {{ active\_pr\_list[0].salutation\_on\_file}}:

{%p else %}

|  |  |  |
| --- | --- | --- |
| {{pr1\_name\_addr}} | {{pr2\_name\_addr}} | {{pr3\_name\_addr}} |

Dear Sirs/Madams:

{%p endif %}

**{{p re\_line\_insert }}**

We wish to thank you for retaining {{firm\_name }} to help you settle the Estate of {{deceased.name}}, who died on {{deceased.death\_date|toDate(“June 3, 1990")}}. You have our sympathy on your loss. To follow up on our first meeting, you may find this outline of what we discussed helpful.

Personal Representatives’ Role

As personal representative, your duties and responsibilities began when {{deceased.name}} died.

1. Record all money you spend or receive as a personal representative;
2. Arrange to prepare and file income tax returns;
3. Safeguard the assets of the Estate:
   1. Keep cash, insurance policies, securities (stock certificates), jewelry, and other valuables in a safe place;
   2. Lock up the Deceased’s home if nobody is staying there, and tell the police. Most insurance policies will allow you to leave a house vacant for 30 days and still provide coverage. Get vacancy coverage after that time;

* 1. Check the insurance on the deceased’s assets (car, house, furniture). Check the expiry dates and tell the insurers of the death;
  2. Arrange for someone to manage the deceased’s business until the Estate is settled;
  3. Make banking arrangements. Tell the banks of the death. Collect and deposit any outstanding cheques (pensions, dividends, interest, salary). Cancel the deceased’s credit cards. We can provide you with letters to send to the banks requesting the Deceased’s account information to include in the assets and debts lists;
  4. Redirect mail if necessary;
  5. Check the dates that bonds mature;
  6. Check mortgages and agreements for sale. Make the payments to keep them up to date, if possible;
  7. Check leases and tenancies. Pay rent that is owed, if possible. Also, give tenants notice of termination, if necessary, and notice about where to send rent payments;
  8. Review the last cheques written by the Deceased to make sure there are no irregularities; and
  9. Be prepared to address any digital asset issues that may arise.

Solicitor’s Role

We agree to:

1. Prepare all documents needed to obtain {{estate.grant\_of\_language}};

1. File the {{estate.grant\_of\_language\_minus\_a}} documents with the court (give the court official copies);
2. Obtain {{estate.grant\_of\_language}};
3. Help confirm the ownership of the Deceased’s assets;
4. Arrange to transfer the assets to your name as {{cfa.multiple\_prs|text\_merge(“personal representative/personal representatives”)}} of the Estate and then to the beneficiaries;
5. Advise you generally about administering the Estate;
6. Prepare letters on your behalf to financial institutions, beneficiaries, and other applicable parties necessary to assist with the administration of the Estate;
7. Assist you with distribution of the Estate to the beneficiaries; and
8. Keep you informed about matters that arise and discuss with you any significant decisions you must make.

We will work with you towards your desired outcome. However, all legal actions are subject to many possible variables such as the demeanor and recollection of witnesses, the availability of substantiating documents and other evidence, and the evidence marshalled by the other side – all of which affect the decision of a judge or jury. Accordingly, we cannot guarantee that your desired result will in fact be achieved. For us to work towards your desired outcome, it will be necessary for you to abide by the terms in this agreement.

We will be representing solelyyou in this matter. Our representation of you does not include the representation of related persons or entities, such as family members; friends; the individuals or entities that are shareholders, directors or officers of a corporation, its parent, subsidiaries or affiliates; partners of a partnership or joint venture; or members of a trade association or other organization. In acting for you, we are not acting for or taking on any responsibilities, obligations or duties to any such related persons or entities and no lawyer-client or other fiduciary relationship exists between us and any such related persons or entities.

Solicitor Fees

The amount to which we are entitled for our services as solicitor is ${{info\_reqd.fee}} plus GST and legal expenses (disbursements).

We will bill you after we obtain {{estate.grant\_of\_language}}. You may pay these bills directly from the Estate.

What we need to proceed

Please provide the following to us so we can begin working on this file:

the Will, any Codicils or lists/memorandums of the Deceased;

the Deceased’s birth certificate, death certificate, marriage certificate, separation agreements, court orders or judgments, financial papers, and insurance policies, as each are applicable. If necessary, we will ask you to give us written authorization to obtain this information;

a list of all the assets of the Estate and an estimate of their value at the time of Deceased’s death;

the latest tax assessment notices on property owned by the Deceased, or have the property appraised as at the date of death;

a list of all the debts and liabilities of the Estate; and

a list of the names, addresses and birthdates of all those who must be legally notified. Depending on the circumstances, these people may include beneficiaries under the Will, current or previous spouses or adult interdependent partners, all children, other next-of-kin, and anyone else who might make a claim on the Estate or who might dispute the Will. Please indicate if anyone listed is under 18 years of age or is mentally incompetent.

Obtaining {{estate.grant\_language\_title}}

Once you give us the Will documents, applicable certificates, and lists of assets and liabilities, I will prepare the legal documents needed to apply to the court for {{estate.grant\_of\_language}}. {{estate.grant\_of\_language|capitalize}} is a court order confirming that you are the {{cfa.multiple\_prs|text\_merge(“personal representative/personal representatives”)}} of the Estate and have filed the necessary documents with the court. Usually financial institutions, the Land Title Office, and others will not deal with you as personal representative until after the court grants {{estate.grant\_of\_language}}.

After {{estate.grant\_language\_title}} is Granted

Generally, the personal representative must settle or pay all debts and then distribute the estate as required by the Will. I will help you put the assets into your name as personal representative and then pass them on to the beneficiaries, the people named in the Will to receive the assets.

After {{estate.grant\_of\_language}} has been granted, we will discuss the further steps which you will take.

Ending the Relationship

You have the right to terminate our services to you upon written notice to us. If you do, you agree to pay our fees and expenses for our legal services up until the time we stop work. We will ask you to sign a court form which tells the court we are no longer your lawyer.

Subject to our obligations to you to maintain proper standards of professional conduct, we reserve the right to terminate our services to you for good reasons which include, but are not limited to:

1. if you fail to cooperate with us in any reasonable request;
2. if our continuing to act would be unethical or impractical; or
3. if you fail to pay our accounts when rendered.

If you terminate our services or we withdraw, you would only have to pay our fees and expenses up until the time we stopped acting for you.

Confidentiality

As your lawyers, we have to share relevant information about this matter with the court and other parties involved. But unless we need to share this information as part of our work, all information you give us will be kept confidential between us.

Should you have any questions or concerns please contact us at your convenience.

{{p letter\_closing\_insert}}

ACKNOWLEDGED AND CONSENTED TO:

|  |  |  |
| --- | --- | --- |
| Lawyer: {{lawyer.name\_on\_docs}} |  | Date |
| {%tr for party in PD(estate\_index, "Personal Representative Filter")%} | | |
|  |  |  |
| Client: {% if party.relationship == "Trust Company" %}{{party.trust\_company\_and\_contact\_te}}{% else %}{{party.name\_on\_file}}{% endif %} |  | Date |
| {%tr endfor %} |  |  |