|  |  |
| --- | --- |
| ESTATE NAME | **{{deceased.name}}** |
| AND ANY OTHER NAME(S) BY WHICH KNOWN | **{% if deceased.aka\_name and deceased.aka\_name|length > 0%}{{ deceased.aka\_name|merge(“a, b and c”)}}{% else %}None{% endif %}** |
| DOCUMENT | **Notice to Beneficiary (Residuary and Non-Residuary)** |

{{address\_block\_insert}}

You are named as a non-residuary and residuary beneficiary in the last {{estate.will\_codicil\_language}} of {{deceased.name}}**.**

The {{estate.will\_codicil\_language}} gives you:

{%p if party.t\_beneficiaries.non\_residual\_financial\_gift|money\_answered %}

1. {{party.t\_beneficiaries.non\_residual\_financial\_gift|money}}{% if trust\_gift(party, "Non-Residual")|answered %} **{{trust\_gift(party, "Non-Residual")}}**{% endif %}

{%p endif %}

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

1. {{gift.gift}}

{%p endfor %}

1. {{party.t\_beneficiaries.residual\_gift}}{% if trust\_gift(party, "Residual")|answered %} **{{trust\_gift(party, "Residual")}}**{% endif %}

{%p if party.t\_beneficiaries.hotchpot %}

As of the date of death, you owed {{party.t\_beneficiaries.hotchpot|money}} to the Deceased. Your share will be adjusted to account for repayment of this debt as will be set out in the estate accounting.

{%p endif %}

{%p if estate.grant\_type\_actual == “Administration with Will Annexed” %}

The {{cfa.multiple\_prs|text\_merge(“person/persons”)}} entitled {{cfa.multiple\_prs|text\_merge(“is/are”)}} applying for a Grant of Administration with Will Annexed.

{%p else %}

The {{cfa.multiple\_prs|text\_merge(“Personal Representative/Personal Representatives”)}} named in the {{estate.will\_codicil\_language}} {{cfa.multiple\_prs|text\_merge(“is/are”)}} applying for {{estate.grant\_of\_language}}. {% if estate\_option(“non\_res\_get\_will”) == True %} Enclosed is a photocopy of the {{estate.will\_codicil\_language}}.{% endif %}

{%p endif %}

Enclosed with this notice is a copy of the Application for {{estate.grant\_of\_language}}. This includes a copy of the {{estate.will\_codicil\_language}} and a list of the Estate property and debts.

Once the court issues the Grant, the {{cfa.multiple\_prs|text\_merge(“Personal Representative/Personal Representatives”)}} will collect in the Estate property, pay the debts, and complete the administration of the Estate and anything else required of the {{cfa.multiple\_prs|text\_merge(“Personal Representative/Personal Representatives”)}}. Then the {{cfa.multiple\_prs|text\_merge(“Personal Representative/Personal Representatives”)}} will be in a position to account to you before distributing any Estate left after payment of all debts and expenses.

By issuing the Grant, the court is not approving the figures submitted in the Application for {{estate.grant\_of\_language}}. It is the responsibility of the {{cfa.multiple\_beneficiaries|text\_merge("beneficiary/beneficiaries")}} to supervise the actions of the {{cfa.multiple\_prs|text\_merge(“Personal Representative/Personal Representatives”)}}.

Alberta’s *Estate Administration Act* and other laws place duties on the {{cfa.multiple\_prs|text\_merge(“Personal Representative/Personal Representatives”)}}, which include communicating regularly with beneficiaries and maintaining proper financial records. If you believe the {{cfa.multiple\_prs|text\_merge(“Personal Representative is/Personal Representatives are”)}} not complying with their duties, try to resolve the matter through discussion with the {{cfa.multiple\_prs|text\_merge(“Personal Representative/Personal Representatives”)}}. If you are unable to resolve the matter you or your lawyer may apply to the Court, which may provide a remedy if it is satisfied that the {{cfa.multiple\_prs|text\_merge(“Personal Representative is/Personal Representatives are”)}} not complying with their duties.

You can contact {{firm\_name}}{% if firm\_name2|answered %}, {{firm\_name2}}{% endif %}, Attention: {{lawyer.name\_on\_docs }} at {{office.full\_address|one\_line\_address}}, phone {{office.phone}}, for any further information you may need.

{{cfa.pr\_signature\_lines}}