|  |  |
| --- | --- |
| 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 (Non-Residuary)** |

{{address\_block\_insert}}

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

{%p if party.non\_res\_gift\_list\_tf != True and party.t\_beneficiaries.non\_residual\_financial\_gift|money\_answered %}

The {{party.t\_beneficiaries.non\_residual\_recorded\_in|gift\_recorded\_in(estate\_index)}} you {{party.t\_beneficiaries.non\_residual\_financial\_gift|money}}{% if trust\_gift(party, "Non-Residual")|answered %} **{{ trust\_gift(party, "Non-Residual") }}**{% endif %}.

{%p endif %}

{%p if party.non\_res\_gift\_list\_tf == True and party.non\_res\_gifts\_list|length == 1 and party.t\_beneficiaries.non\_residual\_financial\_gift|money\_answered != True %}

The {{party.t\_beneficiaries.non\_residual\_recorded\_in|gift\_recorded\_in(estate\_index)}} you {% for gift in party.non\_res\_gifts\_list %}{{gift.gift}}{% endfor %}.

{%p 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 party.non\_res\_gift\_list\_tf == True and party.non\_res\_gifts\_list|length > 1 %}

{% set count = 0 %}The {{party.t\_beneficiaries.non\_residual\_recorded\_in|gift\_recorded\_in(estate\_index)}} you:

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

1. {% set count = 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 %}

{{loop.index +count}}. {{gift.gift}}

{%p endfor %}

{%p endif %}

{%p if party.non\_res\_gift\_list\_tf == True and party.non\_res\_gifts\_list|length == 1 and party.t\_beneficiaries.non\_residual\_financial\_gift|money\_answered %}

The {{party.t\_beneficiaries.non\_residual\_recorded\_in|gift\_recorded\_in(estate\_index)}} you:

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

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

{{loop.index + 1}}. {{gift.gift}}

{%p endfor %}

{%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 %}

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 distribute your gift to you, as long as it is not needed to pay for debts and expenses of the Estate.

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}}