|  |  |
| --- | --- |
| ESTATE NAME | **{{deceased.name}}** |
| DOCUMENT | **Schedule 1: Deceased** |

|  |  |
| --- | --- |
| Last Name | {{deceased.last\_name}} |
| First Name | {{deceased.first\_name}} |
| Middle Name(s), if any | {{deceased.middle\_name}} |
| And any other name(s) by which the Deceased was known | {% if deceased.aka\_name and deceased.aka\_name|length > 0 %}{{deceased.aka\_name|merge("a, b and c")}}{% else %}None {% endif %} |
| Last Residence Address in Full | {{deceased.address}} |
| Date of Birth | {{deceased.birth\_date|toDate("June 3, 1990")}} |
| Place of Birth | {{deceased.birth\_place}} |
| Date of Death | {{deceased.death\_date|toDate("June 3, 1990")}} |
| Place of Death | {{deceased.death\_place}} |
| Habitual Province/State of Residence | {{deceased.habitual\_province}} |
| The Deceased Died | {% if cfa.intestate == True %}Intestate  After a thorough search of all likely places, no testamentary paper of the Deceased has been found. {% else %}Testate {% endif %} |

IMMEDIATE FAMILY

Indicate whether there are any persons in each of the following categories of relationship to the Deceased, and provide the indicated details.

SPOUSE

1 Was the Deceased ever married?

{%p if (cfa.spouse\_name|not\_answered or cfa.spouse\_name == 'None') and cfa.former\_spouse\_count == 0 and not cfa.spouse\_deceased %}

Yes  No

{%p if estate.exceptions == True %}

If yes, provide the following information about each spouse or former spouse:

1.1 Surviving spouse

|  |  |
| --- | --- |
| Name |  |
| Complete address |  |

1.2 Separated spouse (not divorced)

|  |  |  |
| --- | --- | --- |
| Name |  | |
| Complete address |  | |
| Date of separation |  | |
| Date of separated spouse’s death (if applicable) | |  |

1.3 Former spouse(s) divorced within the 2-year period immediately preceding the Deceased’s death

|  |  |  |
| --- | --- | --- |
| Name |  | |
| Complete address |  | |
| Date of divorce |  | |
| Date of former spouse’s death (if applicable) | |  |

1.4 Deceased spouse(s)

|  |  |  |
| --- | --- | --- |
| Name |  | |
| Date of deceased spouse’s death (if applicable) | |  |

{%p endif %}

{%p endif %}

{%p if (cfa.spouse\_name|answered and cfa.spouse\_name != 'None') or cfa.former\_spouse\_count > 0 or cfa.spouse\_deceased %}

Yes  No

{%p if estate.exceptions == True %}

If yes, provide the following information about each spouse or former spouse:

{%p endif %}

{%p if cfa.spouse\_name|answered and cfa.spouse\_name != 'None' and not cfa.spouse\_separated and cfa.spouse\_deceased != True %}

1.1 Surviving spouse

|  |  |
| --- | --- |
| Name | **{{cfa.spouse\_name}}** |
| Complete address | {{cfa.spouse\_address}} |

{%p else %}

1.1 Surviving spouse

|  |  |
| --- | --- |
| Name |  |
| Complete address |  |

{%p endif %}

{%p if (cfa.spouse\_name|answered and cfa.spouse\_name != 'None' and cfa.spouse\_separated) or cfa.former\_spouse\_separated\_not\_divorced == True %}

1.2 Separated spouse (not divorced)

{%p for party in PD(estate\_index, “Separated Spouse Filter”) %}

{%p if loop.index > 1 %}

{%p endif %}

|  |  |  |
| --- | --- | --- |
| Name | **{{party.aka\_name\_language}}** | |
| Complete address | {% if party.is\_deceased == True %}n/a{% else %}{{party.address\_on\_file}}{% endif %} | |
| Date of separation | {{ party.spouse\_separated\_te }} | |
| Date of separated spouse’s death (if applicable) | | {{party.predeceased\_2\_te}} |

{%p endfor %}

{%p else %}

1.2 Separated spouse (not divorced)

|  |  |  |
| --- | --- | --- |
| Name |  | |
| Complete address |  | |
| Date of separation |  | |
| Date of separated spouse’s death (if applicable) | |  |

{%p endif %}

{%p if cfa.former\_spouse\_divorced\_within\_2 %}

1.3 Former spouse(s) divorced within the 2-year period immediately preceding the Deceased’s death

{%p for party in PD(estate\_index, “Former Spouse Divorced Within 2 Filter”) %}

{%p if loop.index > 1 %}

{%p endif %}

|  |  |  |
| --- | --- | --- |
| Name | **{{party.aka\_name\_language}}** | |
| Complete address | {% if party.is\_deceased == True %}n/a{% else %}{{party.address\_on\_file}}{% endif %} | |
| Date of divorce | {{party.former\_spouse\_divorce\_date\_te}} | |
| Date of former spouse’s death (if applicable) | | {{party.predeceased\_2\_te}} |

{%p endfor %}

{%p else %}

1.3 Former spouse(s) divorced within the 2-year period immediately preceding the Deceased’s death

|  |  |  |
| --- | --- | --- |
| Name |  | |
| Complete address |  | |
| Date of divorce |  | |
| Date of former spouse’s death (if applicable) | |  |

{%p endif %}

{%p if (cfa.former\_spouse\_deceased\_not\_separated\_or\_divorced\_within\_2) or (cfa.spouse\_deceased and not cfa.spouse\_separated) %}

1.4 Deceased spouse(s) {% if cfa.former\_spouse\_special\_language %}or Divorced more than 2 years before the Deceased's death{% endif %}

{%p for party in PD(estate\_index, “Deceased Spouse Filter”, deceased.death\_date) %}

{%p if loop.index > 1 %}

{%p endif %}

|  |  |  |
| --- | --- | --- |
| Name | **{{party.aka\_name\_language}}** | |
| {%tr if party.former\_spouse\_show\_divorce\_date %} | | |
| Date of divorce | {{party.former\_spouse\_divorce\_date\_te}} | |
| {%tr endif %} | | |
| Date of deceased spouse’s death (if applicable) | | {{party.predeceased\_2\_te}} |

{%p endfor %}

{%p else %}

1.4 Deceased spouse(s)

|  |  |  |
| --- | --- | --- |
| Name |  | |
| Date of deceased spouse’s death (if applicable) | |  |

{%p endif %}

{%p endif %}

ADULT INTERDEPENDENT PARTNER

2.1 Was the Deceased survived by an adult interdependent partner?

{%p if not cfa.surviving\_aip\_tf %}

Yes  No

If no, leave section 3 blank and proceed to section 4. If yes, complete section 3.

2.2 Was the Deceased the adult interdependent partner of any other person’s at any time within the one-year period immediately preceding the Deceased’s death?

Yes  No

If no, leave section 3 blank and proceed to section 4. If yes, complete section 3.

3 If the answer to question 2.1 or 2.2 is yes, provide the following information about each adult interdependent partner:

|  |  |  |
| --- | --- | --- |
| 3.1 | Name |  |
|  | Complete address |  |

3.2 The adult interdependent partner lived with the Deceased

in a relationship of interdependence for a continuous period of not less than 3 years commencing \_\_\_\_\_\_\_\_\_\_ and ending \_\_\_\_\_\_\_\_\_\_.

or

in a relationship of interdependence of some permanence and there is a child of the relationship who was

born on

adopted on:

the adult interdependent partner entered into an adult interdependent partner agreement with the Deceased which agreement is dated \_\_\_\_\_\_\_\_\_\_.

3.3 The adult interdependent partner and the Deceased entered into an adult interdependent partner agreement dated \_\_\_\_\_\_\_\_\_\_.

A copy of the adult interdependent partner agreement is attached.

3.4 The adult interdependent partner

is

is not

related to the Deceased by blood or adoption.

{%p endif %}

{%p if cfa.surviving\_aip\_tf %}

Yes  No

{%p if estate.exceptions == True %}

If no, leave section 3 blank and proceed to section 4. If yes, complete section 3.

{%p endif %}

2.2 Was the Deceased the adult interdependent partner of any other persons at any time within the one-year period immediately preceding the Deceased’s death?

{%p if cfa.aip\_within\_1\_year\_count > 1 %}

Yes  No

{%p else %}

Yes  No

{%p endif %}

{%p if estate.exceptions == True %}

If no, leave section 3 blank and proceed to section 4. If yes, complete section 3.

{%p endif %}

3 If the answer to question 2.1 or 2.2 is yes, provide the following information about each adult interdependent partner: {% set counter = {'count': 0} %}

{%p for party in PD(estate\_index, “AIP Filter”) %}

{{counter.update({'count':counter['count']+1})}}

|  |  |  |
| --- | --- | --- |
| 3.{{counter.count}} | Name | **{{party.aka\_name\_language}}** |
|  | Complete address | {{party.address\_on\_file}} |

{{counter.update({'count':counter['count']+1})}}3.{{counter.count}} The adult interdependent partner lived with the Deceased

{%p if party.t\_aip.duration\_over\_3 %}

in a relationship of interdependence {{ party.aip\_duration\_te }}

{%p else %}

in a relationship of interdependence for a continuous period of not less than 3 years commencing \_\_\_\_\_\_\_\_\_\_ and ending \_\_\_\_\_\_\_\_\_\_.

{%p endif %}

{%p if party.t\_aip.has\_children %}

in a relationship of interdependence of some permanence and there is a child of the relationship who was

{%p if party.aip\_children\_birth\_dates|answered %}

born on {{party.aip\_children\_birth\_dates }}

{%p else %}

born on

{%p endif %}

{%p if party.aip\_children\_adoption\_dates|answered %}

adopted on {{party.aip\_children\_adoption\_dates}}

{%p else %}

adopted on

{%p endif %}

{%p else %}

in a relationship of interdependence of some permanence and there is a child of the relationship who was

born on

adopted on

{%p endif %}

{%p if party.t\_aip.aip\_agreement %}

the adult interdependent partner entered into an adult interdependent partner agreement with the Deceased which agreement is dated {{party.t\_aip.agreement|toDate("June 3, 1990")}}.

{%p else %}

the adult interdependent partner entered into an adult interdependent partner agreement with the Deceased which agreement is dated \_\_\_\_\_\_\_\_\_\_.

{%p endif %}

{%p if party.t\_aip.agreement|answered %}

{{counter.update({'count':counter['count']+1})}}3.{{counter.count}} The adult interdependent partner and the Deceased entered into an adult interdependent partner agreement dated {{party.t\_aip.agreement|toDate("June 3, 1990")}}.

{%p if party.t\_aip.agreement\_attached %}

A copy of the adult interdependent partner agreement is attached.

{%p else %}

A copy of the adult interdependent partner agreement is attached.

{%p endif %}

{%p else %}

{{counter.update({'count':counter['count']+1})}}3.{{counter.count}} The adult interdependent partner and the Deceased entered into an adult interdependent partner agreement dated \_\_\_\_\_\_\_\_\_\_.

A copy of the adult interdependent partner agreement is attached.

{%p endif %}

{{counter.update({'count':counter['count']+1})}}3.{{counter.count}} The adult interdependent partner

{%p if party.t\_aip.is\_related == True %}

is

is not

{%p else %}

is

is not

{%p endif %}

related to the Deceased by blood or adoption.

{%p endfor %}

{%p endif %}

CAPACITY OF SURVIVING SPOUSE OR ADULT INTERDEPENDENT PARTNER

4 Does any surviving spouse identified in section 1 or any surviving adult interdependent partner identified in section 3 lack mental capacity?

{%p if cfa.spouse\_aip\_lacks\_mental\_capacity is none %}

Yes  No  N/A

{%p elif cfa.spouse\_aip\_lacks\_mental\_capacity == False %}

Yes  No  N/A

{%p elif cfa.spouse\_aip\_lacks\_mental\_capacity == True %}

Yes  No  N/A

{%p if estate.exceptions == True %}

If no, leave the remainder of this section blank and proceed to section 5.

If yes, tick all the applicable boxes and provide the following information about the spouse or adult interdependent partner:

{%p endif %}

{%p for party in PD(estate\_index, "Spouse or AIP Lacks Mental Capacity Filter") %}

|  |  |
| --- | --- |
| Name | **{{party.aka\_name\_language}}** |
| Complete address | {{party.address\_on\_file}} |

{%p if party.t\_dependent.attorney\_name %}

the spouse or adult interdependent partner has the following attorney(s) under an enduring power of attorney:

|  |  |
| --- | --- |
| Name(s) of attorney(s) | {{party.t\_dependent.attorney\_name}} |
| Complete address(es) | {{party.t\_dependent.attorney\_address}} |

{%p if party.t\_dependent.attorney\_epa\_attached %}

a copy of the enduring power of attorney is attached.

{%p else %}

a copy of the enduring power of attorney is attached.

{%p endif %}

{%p else %}

the spouse or adult interdependent partner has the following attorney(s) under an enduring power of attorney:

|  |  |
| --- | --- |
| Name(s) of attorney(s) |  |
| Complete address(es) |  |

a copy of the enduring power of attorney is attached.

{%p endif %}

{%p if party.t\_dependent.trustee\_name %}

the spouse or adult interdependent partner has the following trustee(s):

|  |  |
| --- | --- |
| Name(s) of trustee(s) | {{party.t\_dependent.trustee\_name}} |
| Complete address(es) | {{party.t\_dependent.trustee\_address}} |

{%p if party.t\_dependent.trustee\_order\_attached %}

a copy of the order or instrument appointing the trustee(s) is attached.

{%p else %}

a copy of the order or instrument appointing the trustee(s) is attached.

{%p endif %}

{%p else %}

the spouse or adult interdependent partner has the following trustee(s):

|  |  |
| --- | --- |
| Name(s) of trustee(s) |  |
| Complete address(es) |  |

a copy of the order or instrument appointing the trustee(s) is attached.

{%p endif %}

{%p endfor %}

{%p else %}

Yes  No

{%p if estate.exceptions == True %}

If no, leave the remainder of this section blank and proceed to section 5.

If yes, tick all the applicable boxes and provide the following information about the spouse or adult interdependent partner:

|  |  |
| --- | --- |
| Name |  |
| Complete address |  |

the spouse or adult interdependent partner has the following attorney(s) under an enduring power of attorney:

|  |  |
| --- | --- |
| Name(s) of attorney(s) |  |
| Complete address(es) |  |

a copy of the enduring power of attorney is attached.

the spouse or adult interdependent partner has the following trustee(s):

|  |  |
| --- | --- |
| Name(s) of trustee(s) |  |
| Complete address(es) |  |

a copy of the order or instrument appointing the trustee(s) is attached.

{%p endif %}

{%p endif %}

CHILDREN

5 Was the Deceased survived by any children (whether adults or minors at the date of the Deceased’s death)?

{%p if cfa.surviving\_children\_tf != True %}

Yes  No

{%p if estate.exceptions == True %}

If yes, provide the following information about each child of the Deceased:

|  |  |
| --- | --- |
| Name |  |
| Complete address |  |

At the time of the Deceased’s death, this child was

18 years of age or older

18 years of age or older and unable to earn a livelihood by reason of mental or physical disability

between the ages of 18 and 22 and unable to withdraw from his or her parents’ charge because he or she is a full time student

under 18 years of age, more specifically:

{%p endif %}

{%p endif %}

{%p if cfa.surviving\_children\_tf == True %}

Yes  No

{%p if estate.exceptions == True %}

If yes, provide the following information about each child of the Deceased:

{%p endif %}

{%p for party in PD(estate\_index, “Surviving Child Filter”) %}

{%p if loop.index > 1 %}

{%p endif %}

|  |  |
| --- | --- |
| Name | **{{party.aka\_name\_language}}** |
| Complete address | {% if party.address\_on\_file|answered and party.relationship != “Deceased Child” %}{{party.address\_on\_file}}{% else %}n/a{% endif %} |

At the time of the Deceased’s death, this child was

{%p if party.minor\_tf != True and party.dependent\_adult\_child\_tf != True and party.is\_student != True %}

18 years of age or older

{%p else %}

18 years of age or older

{%p endif %}

{%p if (party.dependent\_adult\_child\_tf == True or (party.t\_dependent.disability\_type and party.t\_dependent.disability\_type != “None of the Above” and party.t\_dependent.is\_unable\_to\_earn\_livelihood == True)) and not party.is\_student %}

18 years of age or older and unable to earn a livelihood by reason of mental or physical disability

{%p else %}

18 years of age or older and unable to earn a livelihood by reason of mental or physical disability

{%p endif %}

{%p if party.is\_student %}

between the ages of 18 and 22 and unable to withdraw from his or her parents’ charge because he or she is a full time student

{%p else %}

between the ages of 18 and 22 and unable to withdraw from his or her parents’ charge because he or she is a full time student

{%p endif %}

{%p if party.minor\_tf == True %}

under 18 years of age, more specifically: {{party.person\_age\_nc3\_te}}

{%p else %}

under 18 years of age, more specifically:

{%p endif %}

{%p endfor %}

{%p endif %}

5.1 If there is a surviving spouse or adult interdependent partner, tick the applicable box:

{%p if (cfa.surviving\_aip\_tf or (cfa.spouse\_name and cfa.spouse\_name != "None")) and cfa.surviving\_children\_tf == True and not cfa.children\_not\_of\_spouse\_or\_aip\_te|answered %}

All of the Deceased’s children are also children of the Deceased’s surviving spouse or adult interdependent partner.

{%p else %}

All of the Deceased’s children are also children of the Deceased’s surviving spouse or adult interdependent partner.

{%p endif %}

OR

{%p if (cfa.surviving\_aip\_tf or (cfa.spouse\_name and cfa.spouse\_name != "None")) and cfa.surviving\_children\_tf == True and cfa.children\_not\_of\_spouse\_or\_aip\_te|answered %}

The following children of the Deceased are not children of the Deceased’s surviving spouse or adult interdependent partner:

{%p for party in PD(estate\_index, "Child Not of Spouse or AIP Filter") %}

|  |  |  |
| --- | --- | --- |
| Name | **{{party.name\_on\_file}}** | |
| Complete address | {{party.address\_on\_file}} | |
| Age (in years and months) at date of Deceased’s death | | {{party.person\_age\_months\_nc3\_te}} |

{%p endfor %}

{%p else %}

The following children of the Deceased are not children of the Deceased’s surviving spouse or adult interdependent partner:

|  |  |  |
| --- | --- | --- |
| Name |  | |
| Complete address |  | |
| Age (in years and months) at date of Deceased’s death | |  |

{%p endif %}

5.2 Did the Deceased have any children who died before or at the same time as the Deceased?

{%p if cfa.deceased\_children\_tf != True %}

Yes  No

{%p if estate.exceptions == True %}

If yes, provide the following information about each child:

|  |  |  |
| --- | --- | --- |
| Name |  | |
| Complete address |  | |
| Age (in years and months) at date of Deceased’s death | |  |

{%p endif %}

{%p endif %}

{%p if cfa.deceased\_children\_tf == True %}

Yes  No

{%p if estate.exceptions == True %}

If yes, provide the following information about each child:

{%p endif %}

{%p for party in PD(estate\_index, “Deceased Child Filter”) %}

|  |  |  |
| --- | --- | --- |
| Name | **{{party.name\_on\_file}}** | |
| Date of Death | {{party.predeceased\_2\_te}} | |
| Complete address | n/a | |
| Age (in years and months) at date of Deceased’s death | | {{party.person\_age\_months\_nc3\_te}} |

{%p endfor %}

{%p endif %}

GRANDCHILDREN OR GREAT-GRANDCHILDREN

6 Was the Deceased survived by any grandchild or great-grandchild

(a) who was under 18 years of age at the time of the Deceased’s death,

(b) in respect of whom the Deceased, during life, demonstrated a settled intention to treat as his or her own child,

(c) whose primary home, since birth or for at least 2 years immediately before the grandparent’s death, was with the grandparent, and

(d) whose financial support, since birth or for at least 2 years immediately before the grandparent’s death, was provided by the grandparent.

{%p if cfa.dependent\_grandchildren\_tf == True %}

Yes  No

{%p if estate.exceptions == True %}

If yes, provide the following information about each grandchild or great-grandchild:

{%p endif %}

{%p for party in PD(estate\_index, “Dependent Grandchild Filter”) %}

|  |  |  |
| --- | --- | --- |
| Name | **{{party.name\_on\_file}}** | |
| Complete address | {{party.address\_on\_file}} | |
| Age (in years and months) at date of Deceased’s death | | {{party.person\_age\_months\_nc3\_te}} |

{%p endfor %}

{%p else %}

Yes  No

{%p if estate.exceptions == True %}

If yes, provide the following information about each grandchild or great-grandchild:

|  |  |  |
| --- | --- | --- |
| Name |  | |
| Complete address |  | |
| Age (in years and months) at date of Deceased’s death | |  |

{%p endif %}

{%p endif %}