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| --- | --- |
| COURT FILE NUMBER | **{{estate.court\_file}}** |
| COURT | **Court of Queen's Bench of Alberta**  **(Surrogate Matter)** |
| JUDICIAL CENTRE | **{{estate.centre}}** |
| 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 | **Acknowledgement of Trustee** |

|  |  |
| --- | --- |
| Name | {{trustee.trustee\_display\_name}} |
| Address for service and contact information of party filing this document | {{trustee.trustee\_address}} |
| Status | {{trustee.trustee\_status\_display}} |
| Relationship to Deceased | {{trustee.trustee\_relationship}} |
| Age | over 18 |
| Any persons with a prior or equal right to trusteeship | {{trustee.other\_trustees\_te}} |
| Renunciations Attached | {{cfa.trustee\_renunciation\_list\_te}} |

{%p if trustee.trustee\_status\_mc == “Named in the Will” %}

1. The Deceased, {{deceased.name}}, signed a Will dated {{will.date|toDate("June 3, 1990")}} in which {% if trustee.trustee\_relationship == "Trust Company" %}we are{% else %}I am{% endif %} appointed Trustee of the following Trusts:

{%p endif %}

{%p if trustee.trustee\_status\_mc == “Named in the Codicil” %}

1. The Deceased, {{deceased.name}}, signed a Codicil dated {{codicil\_date|toDate("June 3, 1990")}} in which {% if trustee.trustee\_relationship == "Trust Company" %}we are{% else %}I am{% endif %} appointed Trustee of the following Trusts:

{%p endif %}

{%p if trustee.trustee\_status\_mc != “Named in the Will” and trustee.trustee\_status\_mc != “Named in the Codicil” %}

1. The Deceased, {{deceased.name}}, signed a Will dated {{will.date|toDate("June 3, 1990")}} in which the Deceased authorized {{trustee.trustee\_named\_by}} to appoint a Trustee. {% if trustee.trustee\_relationship == "Trust Company" %}We{% else %}I{% endif %} have been appointed by {{trustee.trustee\_named\_by}} to be the Trustee of the following Trusts:

{%p endif %}

{%p if estate.codicil == True and other.memorandum == “Yes” %}

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Name of Beneficiary | Age | Address | Para.  No. Will | Para.  No. Codicil | | Para.  No. List |
| {%tr for ben in trustee.ben\_list %} | | | | | | |
| {{ben.name}} | {{ben.age}} | {{ben.address}} | {{ben.will\_para}} | {{ben.codicil\_para}} | {{ben.list\_para}} | |
| {%tr endfor %} | | | | | | |

{%p endif %}

{%p if estate.codicil != True and other.memorandum == “Yes” %}

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name of Beneficiary | Age | Address | Para.  No. Will | Para.  No. List |
| {%tr for ben in trustee.ben\_list %} | | | | |
| {{ben.name}} | {{ben.age}} | {{ben.address}} | {{ben.will\_para}} | {{ben.list\_para}} |
| {%tr endfor %} | | | | |

{%p endif %}

{%p if estate.codicil == True and other.memorandum != “Yes”%}

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name of Beneficiary | Age | Address | Para.  No. Will | Para.  No. Codicil |
| {%tr for ben in trustee.ben\_list %} | | | | |
| {{ben.name}} | {{ben.age}} | {{ben.address}} | {{ben.will\_para}} | {{ben.codicil\_para}} |
| {%tr endfor %} | | | | |

{%p endif %}

{%p if estate.codicil != True and other.memorandum != “Yes” %}

|  |  |  |  |
| --- | --- | --- | --- |
| Name of Beneficiary | Age | Address | Para.  No. Will |
| {%tr for ben in trustee.ben\_list %} | | | |
| {{ben.name}} | {{ben.age}} | {{ben.address}} | {{ben.will\_para}} |
| {%tr endfor %} | | | |

{%p endif %}

2. {% if trustee.trustee\_relationship == "Trust Company" %}We{% else %}I{% endif %} acknowledge that as Trustee:

(a) {% if trustee.trustee\_relationship == "Trust Company" %}We{% else %}I{% endif %} must use the funds in the Trust only in accordance with the terms of the Trust.

(b) {% if trustee.trustee\_relationship == "Trust Company" %}We{% else %}I{% endif %} cannot borrow or take a benefit from the Trust property unless the Will expressly allows {% if trustee.trustee\_relationship == "Trust Company" %}us{% else %}me{% endif %} to do so.

(c) {% if trustee.trustee\_relationship == "Trust Company" %}We{% else %}I{% endif %} must keep adequate records of {% if trustee.trustee\_relationship == "Trust Company" %}our{% else %}my{% endif %} administration of the Trust property.

(d) {% if trustee.trustee\_relationship == "Trust Company" %}We{% else %}I{% endif %} must keep the Trust property separate from any other property.

3. {% if trustee.trustee\_relationship == "Trust Company" %}We{% else %}I{% endif %} will faithfully administer the Trust according to law and will give a true accounting of {% if trustee.trustee\_relationship == "Trust Company" %}our{% else %}my{% endif %} administration of the Trust to the persons entitled to it when lawfully required.

SIGNED ON {{estate.signing\_date\_options|signing\_date(estate.signing\_date\_other)|upper}}.

|  |  |  |
| --- | --- | --- |
| *Signature* |  | *Witness* |
| *Name*: {{trustee.trustee\_signature\_te}} |  | *Name*: {{trustee.trustee\_witness\_mc|witness(lawyer, assistant) }} |