|  |  |
| --- | --- |
| 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 | **Schedule 4: Beneficiaries** |

{%p for party in PD(estate\_index, “Beneficiary Filter NC6”) %}

|  |  |
| --- | --- |
| Name | **{{party.aka\_name\_language}}** |
| Relationship | {{party.relationship}} |
| Complete Address | {% if party.roles and “da” in party.roles and party.t\_dependent. trustee\_name|answered %}c/o {{party.t\_dependent.trustee\_name}}, Trustee  {{party.t\_dependent.trustee\_address}}{% else %}{{party.address\_on\_file}}{% endif %} |
| Age | {{party.person\_age\_nc6\_te}} |

{%p if will.gift\_order == “List Residual Gifts First” %}

{%p if party.t\_beneficiaries.residual\_gift|answered %}

|  |  |  |
| --- | --- | --- |
| Nature of Gift | {% if trust\_gift(party, "Residual")|answered %}**{{trust\_gift(party,"Residual")}}** {% endif %}{{party.t\_beneficiaries.residual\_gift}} | |
| {%tr if party.t\_beneficiaries.residual\_will|answered %} | | |
| {% if party.t\_beneficiaries.type == "Non-Residual and Intestacy" %}Section No. (intestacy){% else %}{% if estate.grant\_type\_actual == “Administration”%}Section No. (intestacy) {% endif %}{% if estate.grant\_type\_actual == “Probate” or estate.grant\_type\_actual == “Administration with Will Annexed” or estate.grant\_type\_actual == “Administration of Unadministered Property” %}Paragraph No. Will{% endif %}{% endif %} | {{party.t\_beneficiaries.residual\_will}} | |
| {%tr endif %} | | |
| {%tr if party.t\_beneficiaries.residual\_codicil|answered %} | | |
| Paragraph No. Codicil | {{party.t\_beneficiaries.residual\_codicil}} | |
| {%tr endif %} | | |
| {%tr if party.t\_beneficiaries.residual\_list|answered %} | | |
| Paragraph No. List/Memorandum | | {{party.t\_beneficiaries.residual\_list}} |
| {%tr endif %} | | |

{%p endif %}

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

|  |  |
| --- | --- |
| Nature of Gift | {% if trust\_gift(party, "Non-Residual")|answered %}**{{trust\_gift(party,"Non-Residual")}}** {% endif %}{{party.t\_beneficiaries.non\_residual\_financial\_gift|money}} |
| {%tr if party.t\_beneficiaries.non\_residual\_will|answered %} | |
| {% if estate.grant\_type\_actual == “Administration”%}Section No. (intestacy) {% endif %}{% if estate.grant\_type\_actual == “Probate” or estate.grant\_type\_actual == “Administration with Will Annexed” or estate.grant\_type\_actual == “Administration of Unadministered Property” %}Paragraph No. Will{% endif %} | {{party.t\_beneficiaries.non\_residual\_will}} |
| {%tr endif %} | |
| {%tr if party.t\_beneficiaries.non\_residual\_codicil|answered %} | |
| Paragraph No. Codicil | {{party.t\_beneficiaries.non\_residual\_codicil}} |
| {%tr endif %} | |
| {%tr if party.t\_beneficiaries.non\_residual\_list|answered %} | |
| Paragraph No. List/Memorandum | {{party.t\_beneficiaries.non\_residual\_list}} |
| {%tr endif %} | |

{%p endif %}

|  |  |
| --- | --- |
| {%tr for gift in party.non\_res\_gifts\_list %} | |
| Nature of Gift | {% if trust\_gift(party, "Non-Residual")|answered %}**{{trust\_gift(party,"Non-Residual")}}** {% endif %}{{gift.gift}} |
| {%tr if gift.will\_para|answered %} | |
| {% if estate.grant\_type\_actual == “Administration”%}Section No. (intestacy) {% endif %}{% if estate.grant\_type\_actual == “Probate” or estate.grant\_type\_actual == “Administration with Will Annexed” or estate.grant\_type\_actual == “Administration of Unadministered Property” %}Paragraph No. Will{% endif %} | {{gift.will\_para}} |
| {%tr endif %} | |
| {%tr if gift.codicil\_para|answered %} | |
| Paragraph No. Codicil | {{gift.codicil\_para}} |
| {%tr endif %} | |
| {%tr if gift.list\_para|answered %} | |
| Paragraph No. List/Memorandum | {{gift.list\_para}} |
| {%tr endif %} | |
| {%tr endfor %} | |

{%p endif %}

{%p if will.gift\_order == “List Non-Residual Gifts First” %}

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

|  |  |
| --- | --- |
| Nature of Gift | {% if trust\_gift(party, "Non-Residual")|answered %}**{{trust\_gift(party,"Non-Residual")}}** {% endif %}{{party.t\_beneficiaries.non\_residual\_financial\_gift|money}} |
| {%tr if party.t\_beneficiaries.non\_residual\_will|answered %} | |
| {% if estate.grant\_type\_actual == “Administration”%}Section No. (intestacy){% endif %}{% if estate.grant\_type\_actual == “Probate” or estate.grant\_type\_actual == “Administration with Will Annexed” or estate.grant\_type\_actual == “Administration of Unadministered Property” %}Paragraph No. Will{% endif %} | {{party.t\_beneficiaries.non\_residual\_will}} |
| {%tr endif %} | |
| {%tr if party.t\_beneficiaries.non\_residual\_codicil|answered %} | |
| Paragraph No. Codicil | {{party.t\_beneficiaries.non\_residual\_codicil}} |
| {%tr endif %} | |
| {%tr if party.t\_beneficiaries.non\_residual\_list|answered %} | |
| Paragraph No. List/Memorandum | {{party.t\_beneficiaries.non\_residual\_list}} |
| {%tr endif %} | |

{%p endif %}

|  |  |
| --- | --- |
| {%tr for gift in party.non\_res\_gifts\_list %} | |
| Nature of Gift | {% if trust\_gift(party, "Non-Residual")|answered %}**{{trust\_gift(party,"Non-Residual")}}** {% endif %}{{gift.gift}} |
| {%tr if gift.will\_para|answered %} | |
| {% if estate.grant\_type\_actual == “Administration”%}Section No. (intestacy){% endif %}{% if estate.grant\_type\_actual == “Probate” or estate.grant\_type\_actual == “Administration with Will Annexed” or estate.grant\_type\_actual == “Administration of Unadministered Property” %}Paragraph No. Will{% endif %} | {{gift.will\_para}} |
| {%tr endif %} | |
| {%tr if gift.codicil\_para|answered %} | |
| Paragraph No. Codicil | {{gift.codicil\_para}} |
| {%tr endif %} | |
| {%tr if gift.list\_para|answered %} | |
| Paragraph No. List/Memorandum | {{gift.list\_para}} |
| {%tr endif %} | |
| {%tr endfor %} | |

{%p if party.t\_beneficiaries.residual\_gift|answered %}

|  |  |  |
| --- | --- | --- |
| Nature of Gift | {% if trust\_gift(party, "Residual")|answered %}**{{trust\_gift(party,"Residual")}}** {% endif %}{{party.t\_beneficiaries.residual\_gift}} | |
| {%tr if party.t\_beneficiaries.residual\_will|answered %} | | |
| {% if party.t\_beneficiaries.type == "Non-Residual and Intestacy" %}Section No. (intestacy){% else %}{% if estate.grant\_type\_actual == “Administration”%}Section No. (intestacy){% endif %}{% if estate.grant\_type\_actual == “Probate” or estate.grant\_type\_actual == “Administration with Will Annexed” or estate.grant\_type\_actual == “Administration of Unadministered Property” %}Paragraph No. Will{% endif %}{% endif %} | {{party.t\_beneficiaries.residual\_will}} | |
| {%tr endif %} | | |
| {%tr if party.t\_beneficiaries.residual\_codicil|answered %} | | |
| Paragraph No. Codicil | {{party.t\_beneficiaries.residual\_codicil}} | |
| {%tr endif %} | | |
| {%tr if party.t\_beneficiaries.residual\_list|answered %} | | |
| Paragraph No. List/Memorandum | | {{party.t\_beneficiaries.residual\_list}} |
| {%tr endif %} | | |

{%p endif %}

{%p endif %}

{%p if cfa.intestate == True and party.t\_beneficiaries.intestacy\_instruction|answered %}

|  |  |
| --- | --- |
| Nature of Gift | {{party.t\_beneficiaries.intestacy\_instruction}} |

{%p endif %}

{%p if party.t\_beneficiaries.special\_circ|answered %}

|  |  |
| --- | --- |
| Gift Comments | {{party.t\_beneficiaries.special\_circ}} |

{%p endif %}

{%p endfor %}

Except as otherwise provided, all beneficiaries are mentally capable.

VOID GIFTS

{%p if cfa.void\_gifts\_1\_tf != True and cfa.void\_gifts\_2\_tf != True %}

No void gifts.

{%p else %}

No void gifts.

{%p endif %}

{%p if deceased.death\_date and deceased.death\_date < cutoff\_date %}

{%p if cfa.void\_gifts\_1\_tf == True %}

{%p for party in PD(estate\_index, “Void Gift 1 Filter”)%}

The gift to {{party.aka\_name\_language}} is void because he or she

{%p if party.t\_beneficiaries.void\_gift\_1 == “Witness to the Will” %}

is a witness to the Will.

{%p else %}

is a witness to the Will.

{%p endif %}

{%p if party.t\_beneficiaries.void\_gift\_1 == “Spouse/AIP of Witness to the Will” %}

at the time the Will was made was the spouse or adult interdependent partner of a witness to the Will.

{%p else %}

at the time the Will was made was the spouse or adult interdependent partner of a witness to the Will.

{%p endif %}

{%p endfor %}

{%p else %}

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

The gift to \_\_\_\_\_\_\_\_\_\_\_ is void because he or she

is a witness to the Will.

at the time the Will was made was the spouse or adult interdependent partner of a witness to the Will.

{%p endif %}

{%p endif %}

{%p endif %}

{%p if deceased.death\_date and deceased.death\_date >= cutoff\_date %}

{%p if cfa.void\_gifts\_2\_tf == True %}

{%p for party in PD(estate\_index,“Void Gift 2 Filter”) %}

The gift to {{party.aka\_name\_language}} is void because he or she

{%p if party.t\_beneficiaries.reason\_gift\_void == “Witness to the Will” %}

is a witness to the Will.

{%p else %}

is a witness to the Will.

{%p endif %}

{%p if party.t\_beneficiaries.reason\_gift\_void == “Spouse/AIP of Witness to the Will” %}

at the time the Will was made was the spouse or adult interdependent partner of a witness to the Will.

{%p else %}

at the time the Will was made was the spouse or adult interdependent partner of a witness to the Will.

{%p endif %}

{%p if party.t\_beneficiaries.reason\_gift\_void == “Signed the Will on behalf of the Deceased” %}

signed the Will on behalf of the Deceased.

{%p else %}

signed the Will on behalf of the Deceased.

{%p endif %}

{%p if party.t\_beneficiaries.reason\_gift\_void == “Spouse/AIP of person who signed the Will on behalf of the Deceased” %}

at the time the Will was made was the spouse or adult interdependent partner of the person who signed the Will on behalf of the Deceased.

{%p else %}

at the time the Will was made was the spouse or adult interdependent partner of the person who signed the Will on behalf of the Deceased.

{%p endif %}

{%p if party.t\_beneficiaries.reason\_gift\_void == “Interpreter who provided translation services to make the Will” %}

was an interpreter who provided translation services in respect of the making of the Will.

{%p else %}

was an interpreter who provided translation services in respect of the making of the Will.

{%p endif %}

{%p if party.t\_beneficiaries.reason\_gift\_void == “Spouse/AIP of interpreter” %}

at the time the Will was made was the spouse or adult interdependent partner of the interpreter who provided translation services in respect of making the Will.

{%p else %}

at the time the Will was made was the spouse or adult interdependent partner of the interpreter who provided translation services in respect of making the Will.

{%p endif %}

{%p endfor %}

{%p else %}

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

The gift to \_\_\_\_\_\_\_\_\_\_\_ is void because he or she

is a witness to the Will.

at the time the Will was made was the spouse or adult interdependent partner of a witness to the Will.

signed the Will on behalf of the Deceased.

at the time the Will was made was the spouse or adult interdependent partner of the person who signed the Will on behalf of the Deceased.

was an interpreter who provided translation services in respect of the making of the Will.

at the time the Will was made was the spouse or adult interdependent partner of the interpreter who provided translation services in respect of making the Will.

{%p endif %}

{%p endif %}

{%p endif %}

REVOKED GIFTS

{%p if cfa.revoked\_gifts\_tf != True %}

No revoked gifts.

{%p else %}

No revoked gifts.

{%p endif %}

{%p if cfa.revoked\_gifts\_tf == True %}

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

{%p if party.t\_beneficiaries.reason\_gift\_revoked == “Divorced” %}

The gift to {{party.aka\_name\_language}} is revoked because the Deceased and {{party.aka\_name\_language}} were divorced on a date that occurred:

a) after the Will was made, and

b) on or after February 1, 2012.

{%p else %}

The gift to {{party.aka\_name\_language}} is revoked because the Deceased and {{party.aka\_name\_language}} were divorced on a date that occurred:

a) after the Will was made, and

b) on or after February 1, 2012.

{%p endif %}

{%p if party.t\_beneficiaries.reason\_gift\_revoked == “Ceased to be AIP of Deceased” %}

The gift to {{party.aka\_name\_language}} is revoked because the Deceased and {{party.aka\_name\_language}} ceased to be adult interdependent partners on a date that occurred:

a) after the Will was made, and

b) on or after February 1, 2012.

{%p else %}

The gift to {{party.aka\_name\_language}} is revoked because the Deceased and {{party.aka\_name\_language}} ceased to be adult interdependent partners on a date that occurred:

a) after the Will was made, and

b) on or after February 1, 2012.

{%p endif %}

{%p endfor %}

{%p else %}

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

The gift to \_\_\_\_\_\_\_\_\_\_\_ is revoked because the Deceased and \_\_\_\_\_\_\_\_\_\_\_ were divorced on a date that occurred:

a) after the Will was made, and

b) on or after February 1, 2012.

The gift to \_\_\_\_\_\_\_\_\_\_\_ is revoked because the Deceased and \_\_\_\_\_\_\_\_\_\_\_ ceased to be adult interdependent partners on a date that occurred:

a) after the Will was made, and

b) on or after February 1, 2012.

{%p endif %}

{%p endif %}