|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  |  | **Estate of {{deceased.name}}** | | |
| Matter Number: | **{{estate.matter\_number}}** | Judicial Centre: | **{{estate.centre}}** | |
| Responsible Lawyer: | {{lawyer.name\_on\_docs}} | Type of Grant: | **{{estate.grant\_of\_language}}** | |
| {% if office\_list|length > 1 %}Office:{% endif %} | {% if office\_list|length > 1 %}{{office.name}}{% endif %} | Deceased Left: | {{estate.will\_codicil\_language}} | |
| Opened: | {{matter.date\_opened|toDate("June 3, 1990")}} | Resealing: | {% if estate.reseal %}Yes{% else %}No{% endif %} | |
| Closed: | {{matter.date\_closed|toDate("June 3, 1990")}} | Bond: | {{other.bond}} | |
|  |  | Public Trustee Involved: | | {{cfa.copy\_filed}} |
|  |  | Notice to Creditors and Claimants (NC34) being filed: | | {% if estate.nc34%}Yes{%else%}No{%endif%} |

|  |  |
| --- | --- |
| Heading Note: | Matter Note: |
| **{{matter.heading\_note}}** | {{matter.file\_note}} |

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Deceased: | **{{deceased.name}}** | | | | | |
| Born: | | **{{deceased.birth\_date|toDate("June 3, 1990")}}** | Died: | **{{deceased.death\_date|toDate("June 3, 1990")}}** | Age: | **{{deceased.age\_at\_death}}** |

**Parties**

{%p if parties\_list|length > 0 %}

| Name, Relationship & Contact Info | D.O.B | PD | PR | TR | Ben | Type | Min | DA | Other |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| {%tr for party in parties\_list %} | | | | | | | | | |
| {%tr if (loop.index) is not divisibleby 2 %} | | | | | | | | | |
| **{{party.name\_on\_file}},** {{party.relationship}}  {%p for phone in party.phones %}  {{phone.data\_type}}: {{phone.phone}}  {%p endfor %}  {%p if party.selected\_email %}  Email: {{party.email\_on\_file}}  {%p endif %}  {{party.address\_on\_file}} | {{party.date\_of\_birth|toDate("Jun 3, 1990")}} | {{party.pd}} | **{{party.pr}}** | {{party.tr}} | **{{party.ben}}** | {{party.ben\_type}} | {{party.min}} | {{party.da}} | {{party.other}} |
| {%tr else %} | | | | | | | | | |
| **{{party.name\_on\_file}},** {{party.relationship}}  {%p for phone in party.phones %}  {{phone.data\_type}}: {{phone.phone}}  {%p endfor %}  {%p if party.selected\_email %}  Email: {{party.email\_on\_file}}  {%p endif %}  {{party.address\_on\_file}} | {{party.date\_of\_birth|toDate("Jun 3, 1990")}} | {{party.pd}} | **{{party.pr}}** | {{party.tr}} | **{{party.ben}}** | {{party.ben\_type}} | {{party.min}} | {{party.da}} | {{party.other}} |
| {%tr endif %} | | | | | | | | | |
| {%tr endfor %} | | | | | | | | | |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| D.O.B. – Date of Birth | Other: | | Ben - Beneficiary | |
| PD – Pre-deceased |  | ren. – Renouncing | Type – Beneficiary Type: | |
| PR – Active Personal Representative |  | res. – Reserving |  | R – Residual |
| TR – Trustee |  | nom'g. – Nominating |  | NR – Non-Residual |
| Min – Minor |  | nom'd. – Nominated |  | Int. - Intestacy |
| DA – Represented or Dependent Adult |  | bank – Financial Institution |  |  |

{%p else %}

-------------------------- No Parties Currently on File --------------------------

{%p endif %}

{%p if estate\_user\_notes\_list|length > 0 %}

**User Notes**

| Created | User | Note | Modified |
| --- | --- | --- | --- |
| {%tr for note in estate\_user\_notes\_list %} | | | |
| {%tr if (loop.index) is not divisibleby 2 %} | | | |
| {{note.date|toDate("Jun 3, 1990")}} | {{note.user\_initials}} | {{note.text}} | {{note.date\_modified|toDate("Jun 3, 1990")}} |
| {%tr else %} | | | |
| {{note.date|toDate("Jun 3, 1990")}} | {{note.user\_initials}} | {{note.text}} | {{note.date\_modified|toDate("Jun 3, 1990")}} |
| {%tr endif %} | | | |
| {%tr endfor %} | | | |

{%p endif %}

{%p if include\_inventory %}

{%p if not client\_key %}

{{p inventory\_report\_insert}}

{%p elif client\_key and client\_key == 163 %}

{{p inventory\_report\_insert}}

{%p endif %}

{%p endif %}