|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Estate of {{deceased.name}}** | | | | |
| Matter Number: | **{{estate.matter\_number}}** | Type of Grant: | **{{estate.grant\_type}}** | |
| Responsible Lawyer: | {{lawyer.name\_on\_docs}} | Judicial Centre: | **{{estate.centre}}** | |
| {%tr if office\_list|length > 1 %} | | | | |
| Office: | {{office.name}} |  |  | |
| {%tr endif %} | | | | |
| Opened: | {{matter.date\_opened|toDate("June 3, 1990")}} | Bond: | {{other.bond}} | |
| Closed: | {{matter.date\_closed|toDate("June 3, 1990")}} | Public Trustee Involved: | | {{ "Yes" if cfa.ga4 else "No" }} |

{%p if matter.heading\_note|answered or matter.file\_note|answered %}

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

{%p endif %}

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| 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 & Contact Info | Relationship & Birthdate | Deceased | PR | Trustee | Ben. Type | Minor | Dep Adult | Other |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| {%tr for party in parties\_list %} | | | | | | | | |
| {%tr if (loop.index) is not divisibleby 2 %} | | | | | | | | |
| **{{party.name\_on\_file}}**  {%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.relationship}}  {{party.date\_of\_birth|toDate("Jun 3, 1990")}} | {{party.pd}} | **{{party.pr}}** | {{party.tr}} | {{party.ben\_type}} | {{party.min}} | {{party.da}} | {{party.other}} |
| {%tr if party.pom\_notes|length > 0 %} | | | | | | | |
| Other Notes:  {%p for note in party.pom\_notes %}   * {{note}}   {%p endfor %} | | | | | | | |
| {%tr endif %} | | | | | | | |
| {%tr else %} | | | | | | | | |
| **{{party.name\_on\_file}}**  {%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.relationship}}  {{party.date\_of\_birth|toDate("Jun 3, 1990")}} | {{party.pd}} | **{{party.pr}}** | {{party.tr}} | {{party.ben\_type}} | {{party.min}} | {{party.da}} | {{party.other}} |
| {%tr if party.pom\_notes|length > 0 %} | | | | | | | |
| Other Notes:  {%p for note in party.pom\_notes %}   * {{note}}   {%p endfor %} | | | | | | | |
| {%tr endif %} | | | | | | | |
| {%tr endif %} | | | | | | | | |
| {%tr endfor %} | | | | | | | | |

|  |  |  |
| --- | --- | --- |
| PR – Personal Representative | Ren. PR – Renouncing | Bank – Financial Institution |
| Trust – Trustee | Ren. Trust – Renouncing Trustee | Res. PR - Reserving |
| Rev. PR - Revoking |  |  |

{%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 %}