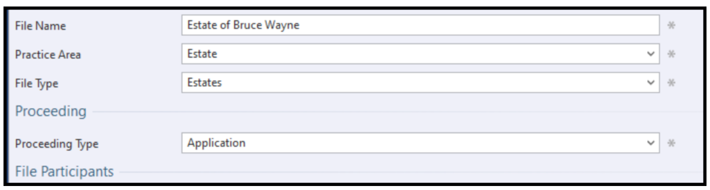
ACL5 | WORKING WITH ESTATE FORMS

** REVIEW ALL SECTIONS BEFORE PROCEEDING TO OPEN OR EDIT THE ESTATE FILE **

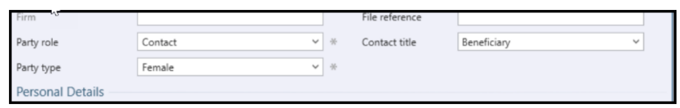
When creating estate forms within ACL, the file must be setup correctly in order for relevant information to be available in the specialized estate information inline dialog. The inline dialog pulls all relevant information into the forms as required.

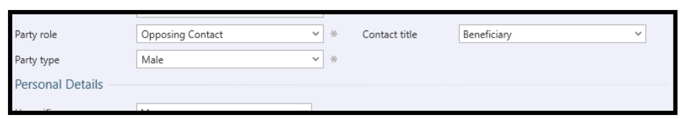
File Details and Parties



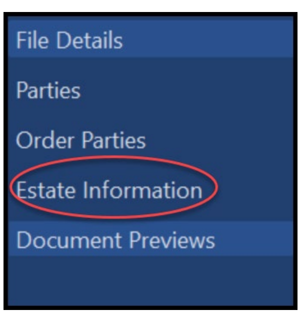
When creating an estate file, ensure that the **Practice Area** has been set to **Estates** and the **File Type** has also been set to **Estates**. The **Proceeding Type** should be set to **Application**.

When adding the parties, the Estate Trustee should be added as an Applicant. ****Note** the deceased should not be entered to the **Parties** page. The deceased's information is entered using the Estate Information Inline Dialog. Beneficiaries can be added in as the firm's (our party) **Contact,** or as an opposing party **Opposing Contact**.



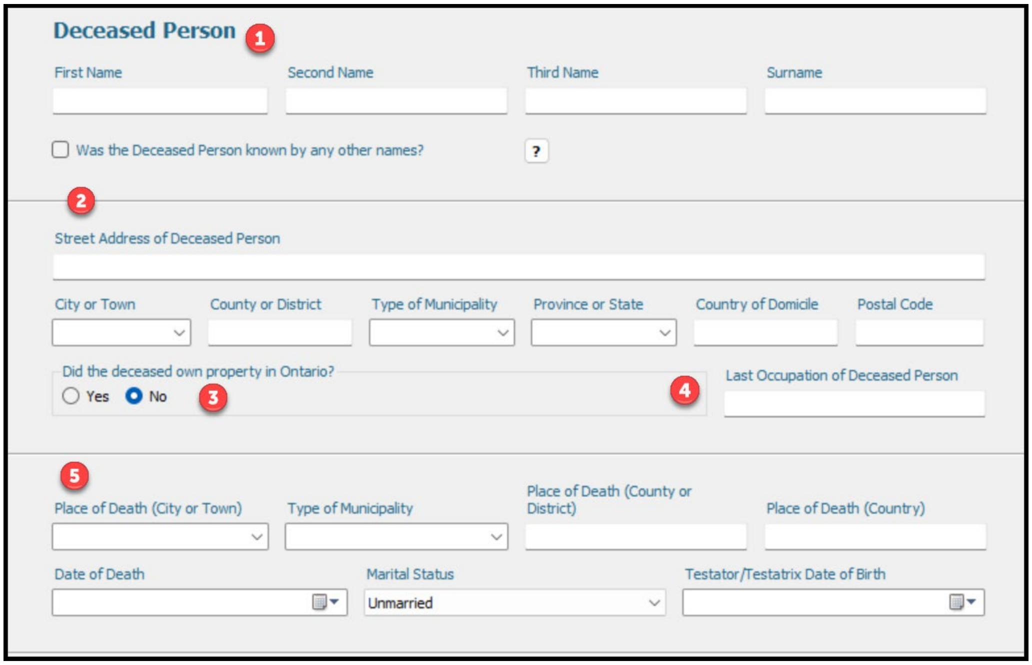


Estate Information Inline Dialog



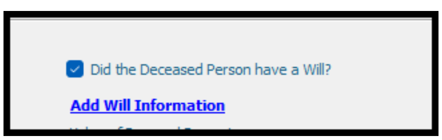
Once the **File Details** and **Party** information has been entered, click **Estate Information** to enter the estate specific data, and to select the Applicants and Beneficiaries.

Information About the Deceased



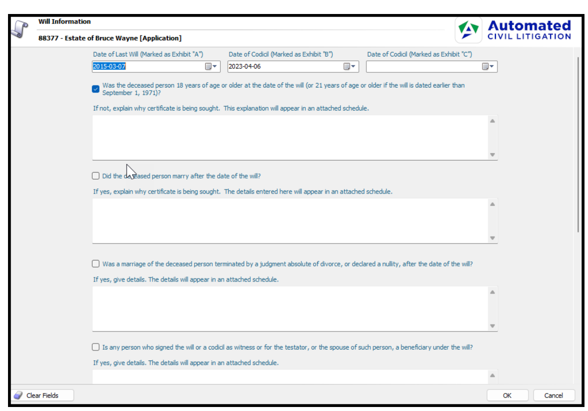
1. Enter the name of the deceased, and if the deceased was known by any other name.
2. Enter the address where the deceased resided.
3. Check the correct option if the deceased owned property in Ontario.
4. Enter the deceased's last occupation.
5. Enter the deceased's place of death, marital status and the Testator/Testatrix date of birth.

Will/Codicil Information

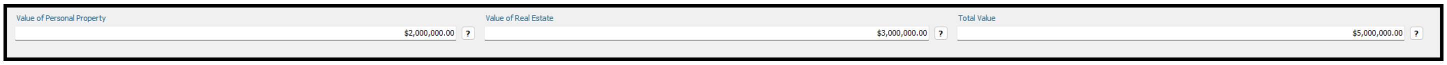


If the deceased had a will, ensure the option has been checked off, and click **Add Will Information**. A dialog box will open.

Enter the required information in the dialog that opened and click **OK** once complete. Note the checkboxes must be selected for each relevant section of the Will Information.



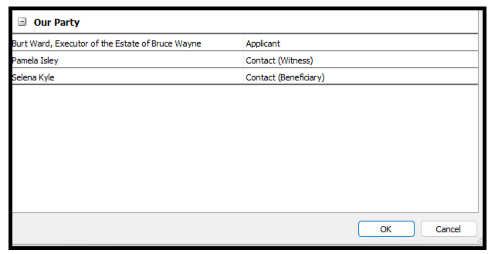
Enter the value of any personal property or real estate, if known. Information can be added to the dialog later if not available at the time of file opening.



Applicants

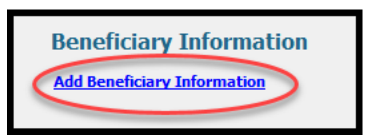
Click **Add Applicant(s)** to select the party or parties acting as Estate Trustee(s).

Select the party or parties acting as the trustee and click OK and complete any missing information such as **Relationship to the Deceased.**

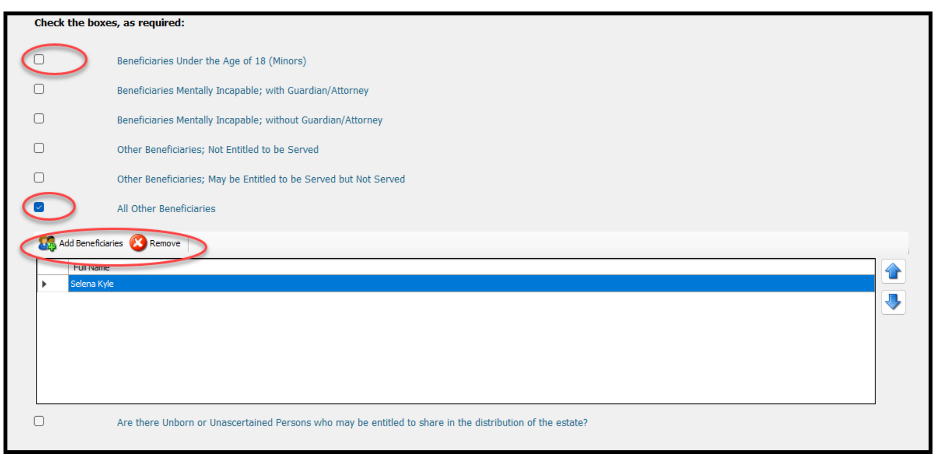


Beneficiaries

Click **Add Beneficiary Information.**



Check all the required boxes. Once a box has been checked, users will have the ability to choose which beneficiaries are to be selected by click **Add Beneficiaries**.



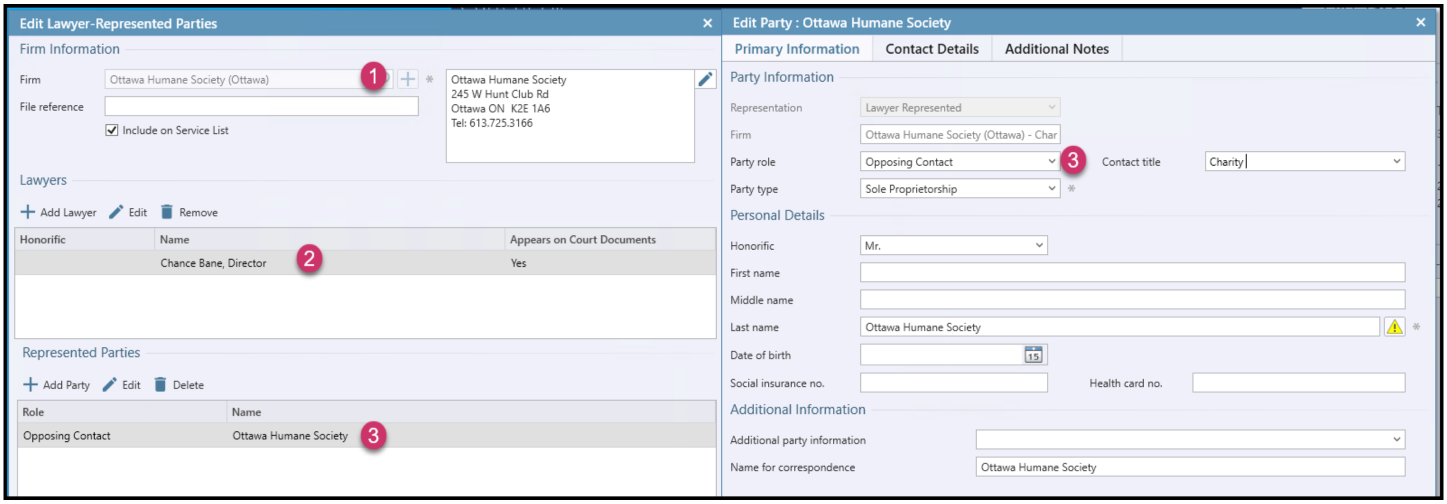
Adding Corporate Beneficiaries such as Charities

Please review the the [Ontario provincial website] regarding directors and trustees for charities. Key details include:

- Directors manage charitable corporations, while trustees manage unincorporated charities and trusts.
- An incorporated charity must have at least three directors.
- Directors and trustees are responsible for administering and managing their charity and must ensure their charity operates according to the law.

When adding a corporate beneficiary to the ACL file, the party must be added as an Opposing Law Firm, and the Director(s) or Trustee(s) must be added as the lawyer(s). The charity can be added as the opposing party.

Adding corporate beneficiaries in this way allows users to manage and save the order in which they appear when using the applicable dialogs in ACL.



Once all known information is entered to the [Estate Information Inline Dialog], users can navigate to the **Court Forms** tab to begin generating documents.