



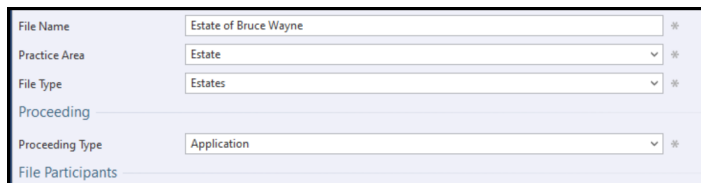
ACL5

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.

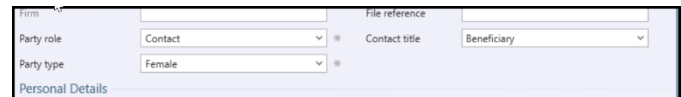
File Details and Parties



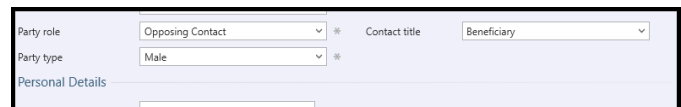
File Name	Estate of Bruce Wayne	*
Practice Area	Estate	*
File Type	Estates	*
Proceeding		
Proceeding Type	Application	*
File Participants		

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**.

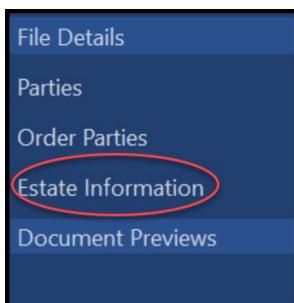


Party role	Contact	*	Contact title	Beneficiary
Party type	Female	*		
Personal Details				



Party role	Opposing Contact	*	Contact title	Beneficiary
Party type	Male	*		
Personal Details				

Estate Information Inline Dialog



- File Details
- Parties
- Order Parties
- Estate Information**
- Document Previews

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.



For assistance contact:

ACL Support

416.363.1650 x100 / 1.800.340.3234 x100

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Information About the Deceased

The screenshot shows a form titled "Deceased Person" with the following fields and callouts:

- 1**: Callout pointing to the "First Name", "Second Name", "Third Name", and "Surname" input fields.
- 2**: Callout pointing to the "Street Address of Deceased Person" input field.
- 3**: Callout pointing to the "No" radio button for "Did the deceased own property in Ontario?".
- 4**: Callout pointing to the "Last Occupation of Deceased Person" input field.
- 5**: Callout pointing to the "Place of Death (City or Town)", "Type of Municipality", "Place of Death (County or District)", and "Place of Death (Country)" input fields.

Other fields include "City or Town", "County or District", "Type of Municipality", "Province or State", "Country of Domicile", "Postal Code", "Date of Death", "Marital Status", and "Testator/Testatrix Date of Birth".

- 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

The screenshot shows a checkbox labeled "Did the Deceased Person have a Will?" which is checked. Below it is a blue link labeled "Add Will 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.

The screenshot shows the "Will Information" dialog box with the following fields and checkboxes:

- Three date fields: "Date of Last Will (Marked as Exhibit 'A')", "Date of Codicil (Marked as Exhibit 'B')", and "Date of Codicil (Marked as Exhibit 'C')".
- Checkbox: "Was the deceased person 18 years of age or older at the date of the will (or 21 years of age or older if the will is dated earlier than September 1, 1971)?" (checked).
- Text area: "If not, explain why certificate is being sought. This explanation will appear in an attached schedule."
- Checkbox: "Did the deceased person marry after the date of the will?" (unchecked).
- Text area: "If yes, explain why certificate is being sought. The details entered here will appear in an attached schedule."
- Checkbox: "Was a marriage of the deceased person terminated by a judgment absolute of divorce, or declared a nullity, after the date of the will?" (unchecked).
- Text area: "If yes, give details. The details will appear in an attached schedule."
- Checkbox: "Is any person who signed the will or a codicil as witness or for the testator, or the spouse of such person, a beneficiary under the will?" (unchecked).
- Text area: "If yes, give details. The details will appear in an attached schedule."
- Buttons: "Clear Fields", "OK", and "Cancel".

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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.

Value of Personal Property	\$2,000,000.00 ?	Value of Real Estate	\$3,000,000.00 ?	Total Value	\$5,000,000.00 ?
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Applicants

Applicants or Estate Trustees

Add Applicant(s) Remove

Full Name

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**.

Our Party

Burt Ward, Executor of the Estate of Bruce Wayne	Applicant
Pamela Isley	Contact (Witness)
Selenia Kyle	Contact (Beneficiary)

OK Cancel

Beneficiaries

Click **Add Beneficiary Information**.

Beneficiary Information

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**.

Check the boxes, as required:

- Beneficiaries Under the Age of 18 (Minors)
- Beneficiaries Mentally Incapable; with Guardian/Attorney
- Beneficiaries Mentally Incapable; without Guardian/Attorney
- Other Beneficiaries; Not Entitled to be Served
- Other Beneficiaries; May be Entitled to be Served but Not Served
- All Other Beneficiaries

Add Beneficiaries Remove

Full Name

Selenia Kyle

Are there Unborn or Unascertained Persons who may be entitled to share in the distribution of the estate?

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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.

The screenshot displays two overlapping software dialog boxes. The left dialog, titled 'Edit Lawyer-Represented Parties', contains a 'Firm Information' section with a 'Firm' field (Ottawa Humane Society (Ottawa)) and a 'File reference' field. Below this is a 'Lawyers' table with columns for 'Honorific', 'Name', and 'Appears on Court Documents'. A table entry shows 'Chance Bane, Director' with 'Yes' in the third column. At the bottom is a 'Represented Parties' table with columns for 'Role' and 'Name'. An entry shows 'Opposing Contact' for 'Ottawa Humane Society'. The right dialog, titled 'Edit Party : Ottawa Humane Society', has tabs for 'Primary Information', 'Contact Details', and 'Additional Notes'. The 'Primary Information' tab is active, showing 'Party Information' with dropdowns for 'Representation' (Lawyer Represented), 'Party role' (Opposing Contact), and 'Party type' (Sole Proprietorship). A 'Contact title' field contains 'Charity'. Below is a 'Personal Details' section with fields for 'Honorific' (Mr.), 'First name', 'Middle name', 'Last name' (Ottawa Humane Society), 'Date of birth', 'Social insurance no.', and 'Health card no.'. An 'Additional Information' section at the bottom has a dropdown for 'Additional party information' and a text field for 'Name for correspondence' (Ottawa Humane Society).

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

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