

Surrogate Digital Service (SDS) User Guide

Surrogate Digital Service is:

- Found at: surrogate.alberta.ca
- Able to process most grant applications. See [What does SDS Accept?](#) for details
- Available for use province-wide by
 - Lawyers and their assistants,
 - People applying without a lawyer
 - Surrogate clerks and Judicial assigners
 - King's Bench Justices
 - The Public Trustee
- Mandated for use by lawyers for grants the service can process as of [September 13, 2022](#) and [November 17, 2023](#).

For support, contact:

jsg.surrogatesupport@gov.ab.ca

Key features of Surrogate Digital Service (SDS)

- **File Numbers:** Applications submitted via the service are assigned file numbers in the format DES-1234567, which are automatically assigned by the service when a clerk completes their review (NOT at the time of submission to the Court).
- **Payment:** Occurs online by credit card at the time the application is submitted for Court review (NOT at the time the Grant is issued). Payment is processed by SDS and does not require clerk involvement.
- **Notice to Beneficiaries and other interested parties, including the Public Trustee:** Notices are automatically served digitally after clerk approval. Preparers can serve by alternative methods if a beneficiary or potential claimant doesn't have email.
- **Grants:** Grants are automatically created and distributed by SDS. Clerks are not involved in preparing or distributing Grants.

Table of contents

APPLICATION STATUSES AND WAIT TIMES	3
DASHBOARD	3
<i>Status of applications</i>	3
<i>Dashboard organization</i>	3
CREATING A NEW APPLICATION.....	4
<i>Which applications are accepted?</i>	4
<i>The application process</i>	5
<i>Step 1: Apply for Grant</i>	5
<i>Adding applicants</i>	5
<i>Nominations</i>	6
<i>Renunciations</i>	6
<i>Bond or permission required (Applicant Residency)</i>	7
<i>Other People with priority to apply (Grant of Admin or Admin with Will Annexed)</i>	7
<i>Uploading the will and other testamentary documents</i>	8
<i>Uploading Supporting Documents</i>	8
<i>Express Authorizations</i>	9
<i>Explaining irregularities or special circumstances</i>	9
<i>Beneficiaries</i>	10
<i>Beneficiaries when there is a will</i>	10
<i>Beneficiaries on intestacy</i>	12
<i>Adding a person as a Beneficiary</i>	12
<i>Potential claimants</i>	13
<i>Sole Beneficiaries</i>	13
<i>Inventory</i>	14
<i>Review draft and send</i>	14
<i>Errors and warnings</i>	15
WHAT PEOPLE CAN EXPECT	16
<i>Renunciations, Nominations, Beneficiary Consent to Waive Bond</i>	16
<i>Applicant certification</i>	17
TRACKING AND MANAGING CERTIFICATIONS	18
<i>Certification Stages</i>	18
SUBMIT AND PAY	19
DELETING A DRAFT APPLICATION	20
SERVING NOTICES.....	20
<i>Tracking and managing notices</i>	21
<i>Editing contact information for service</i>	21
<i>Serving the Public Trustee</i>	22
<i>Response from the Public Trustee</i>	23
RECALLING AN APPLICATION.....	24
SUBMITTING THE WILL AND TESTAMENTARY DOCUMENTS	25
DOWNLOADING A GRANT	25
THE GRANT	26
AMENDING AN INVENTORY WITH TBD VALUES	27
AMENDING AN INVENTORY WITHOUT TBD VALUES	27
RESUBMITTING AN APPLICATION THAT HAS BEEN REJECTED BY A CLERK.....	28
RESPONDING TO JUSTICE SEEKING CLARIFICATION.....	28
RESUBMITTING AN APPLICATION THAT HAS BEEN REJECTED BY A JUSTICE.....	29
HALTED APPLICATIONS (DUE TO CAVEAT OR CONFLICTING APPLICATION FILED WITH THE COURT)	30
“WHAT TO EXPECT” DOCUMENTS	30
SCREENING CRITERIA FOR APPLICATIONS IN THE DIGITAL SERVICE.....	31
<i>Grant of Probate Questions</i>	31
<i>Grant of Administration Questions</i>	31
THE GRANT APPLICATION PROCESS IN SURROGATE DIGITAL SERVICE.....	32
<i>Applicant certification statement - Probate or Admin with Will Annexed – ORIGINAL WILL AND TESTAMENTARY DOCUMENTS</i>	33
<i>Applicant certification statement - Probate or Admin with Will Annexed – COPY OF ONE OR MORE TESTAMENTARY DOCUMENTS</i>	34
<i>Applicant certification statement - Administration</i>	35
<i>Renunciant certification statement</i>	36
<i>Nomination certification statement</i>	36
<i>Digital renunciation or nomination process</i>	36
<i>Certification statement for will and testamentary documents</i>	36

Application statuses and wait times

Applications in SDS move through a standard series of steps. At each step, an application requires action from a different person or people in the process. Wait times vary and depend on the step.

Dashboard

Status of applications

Your application will normally flow through the following statuses:

- Draft:** the application is in progress, prior to seeking applicant certification
- Pending Certification:** the application has been sent to the applicant(s) for certification
- Ready to Submit:** the application has been certified by applications and can now be submitted to the Court with payment
- Submitted:** the application is pending review by a Surrogate clerk
- Pending Service:** the application has been approved by a Surrogate clerk and digital notices to beneficiaries and interested parties have been generated. Non-digital notices are pending.
- Pending Final Decision:** service has been completed and the application is pending review by a Justice
- Approved**
- Draft, Pending Certification, OR Pending Service: Amended Inventory:** if the application issued a grant with an incomplete inventory, the inventory can be amended, certified by applicant(s), then served to interested parties.

In some scenarios, an application could be in one of the following statuses:

- Returned by Clerk:** the application did not pass the initial clerk review. Revisions are required to be for resubmission.
- Seeking Clarification:** The Justice has a question that can be answered without making changes to the application. You can reply with a message as well as an uploaded document, if required.
- Rejected by Justice:** The Justice will provide rejection reasons. The application must be revised as directed before re-submission.

Halted: a caveat or conflicting application has been found by the Court.

Dashboard organization

The dashboard displays applications in order of when they were last modified. Applications that changed most recently will display at the top. A change could be an edit to the application content, or it could be a change in status.

You can filter the dashboard by application status. This may help you find specific applications more easily.

- Click the Filter icon to open a window
- Select the statuses you want to view

Active filters display above the dashboard

Law Firm Dashboard						New application
Manage applications and view historical transactions.						
Applications						
Wills, estates & trusteeships						
Date modified ↓	Lawyer file no.	File number	Applicant(s)	Deceased	Status ▾	
Mar 7, 2024	---	DES-0001823	Licant, Abe	Deadman, Guy	1 Draft	
Mar 7, 2024	---	DES-0001745	Rothko, Mark	Hopper, Edward	2 Pending Certification	
Mar 6, 2024	---	DES-0000705	Feinman, Richard	Einstein, Albert	3 Ready To Submit	
Mar 6, 2024	---	DES-0001002	Licant, App	Intestacy, Partial	4 Submitted	
Mar 4, 2024	---	DES-0001605	Lafleur, Cheri	Lafleur, Guy Admin	5 Pending Service	
Mar 4, 2024	---	DES-0001597	Aldrin, Edwin	Collins, Michael Partially-Intestate	6 Pending Final Decision	
Mar 4, 2024	---	DES-0001567	Aldrin, Edwin	Collins, Michael Probate	7 Approved	
Mar 1, 2024	---	DES-0001801	Olsen, Peggy	Draper, Don	8 Draft: Amended Inventory	
Feb 27, 2024	---	DES-0001513	Shepard Jr, Alan	Shephard, Alan	9 Rejected by clerk	
Feb 27, 2024	---	DES-0001409	Aldrin, Edwin	Collins, Michael	10 Seeking Clarification	
Feb 23, 2024	---	DES-0001781	Tereshkova, Valentina	Collins, Michael	11 Rejected by Justice	
Feb 23, 2024	---	DES-0001780	Horne, Alex	Davies, Greg	12 Halted	

The screenshot shows the 'Applications' dashboard with a table of applications and a filter dropdown menu. The table has columns for Date modified, Lawyer file no., File number, Applicant(s), and Deceased. The filter dropdown is open, showing a list of statuses with checkboxes. The 'Approved' and 'Approved: Amended Inventory' statuses are selected.

Date modified	Lawyer file no.	File number	Applicant(s)	Deceased	Status
Feb 23, 2024	---	DES-0001410	Draper, Sally	Draper, Don	3 Approved
Jan 19, 2024	---	DES-0001605	Kellman, Gerri	Roy, Logan	2 Approved: Amended Inventory
Jan 17, 2024	---	DES-0001597	Flintstone, Wilma	Flintstone, Fred	Draft
Jan 17, 2024	D44761	DES-0001567	Jimenez, Shayna	Clements, Heather A	Draft: Amended Inventory
Jan 17, 2024	6A5B10	DES-0001772	Hudson, Garth	Robertson, Robbie	Halted
Jan 17, 2024	76FE36	DES-0000817	Simonsen, Homer J	Flanders, Ned	In Review
Jan 15, 2024	371A19	DES-0001034	Ortiz, Barbara	Kirby, Paul I	Pending Certification
Jan 8, 2024	PT-TEST	DES-0001137	Roy, Siobahn	Roy, Logan	Pending Certification: Amended Inventory
Aug 14, 2023	FB70E0	DES-0001946	Simonsen, Marae	Simonsen, Homer J	Pending Final Decision

Creating a new application

1. To create a new application, click the “New application” button in the top-right of the dashboard.
2. SDS will accept most probate, administration and administration with will annexed applications. Each time you start a new application you must answer a series of screening and eligibility questions.
3. The initial questions will determine the type of grant you are applying for. Be sure to answer these questions correctly, as **you cannot change the application type later**.
4. After SDS has determined the grant type, you will be presented with an additional set of screening questions. These questions determine if SDS can process your application. This ensures that you don't create an application that SDS cannot process. Be sure to answer these questions correctly. If an application is rejected because these questions were answered incorrectly, your application will be rejected and you will not be eligible for a refund.

The screenshot shows the 'Law Firm Dashboard' with a 'New application' button in the top right. The main content area is titled 'Screening questions' and contains the following text: 'Select from the following options to describe your application. The deceased:' followed by three radio button options: 'Left a valid will, or one that has been validated by Court order', 'Left an invalid will, or one that has been invalidated by Court order', and 'Did not leave a will'. Below this is a reference to 'Section 14 of the Wills and Succession Act'. There are two 'Yes/No' toggle buttons for the questions: 'Is the applicant a personal representative or alternate named in the will?' and 'Does the will deal with the entirety of the deceased's estate?'. A third section, 'Your application is for a Grant of Probate', includes a bullet point: 'If your application includes a will validated by Court Order, you must upload the Order as part of your application.' Below this is the 'Eligibility questions' section with a 'General' heading and four checkbox options: 'This is not a request for a limited Grant.', 'This is not a resubmission for a previously rejected NC/GA application.', 'This is not a request for a full Grant, where a limited Grant was previously obtained using an NC/GA application.', and 'There is no prior Grant issued by a foreign court.' A final checkbox option is 'This application does not include a void gift.' A note at the bottom states: 'Survivorship: If the will contains a survivorship clause you may start the application, but it cannot be certified or submitted until after the survivorship period has passed.'

Which applications are accepted?

Check the [SDS homepage](#) for details about which applications are accepted.

If your application does not meet the current criteria, you must submit your application using GA forms, which can be found online:

[Surrogate forms - Non-contentious matters`](#)

The application process

An SDS application differs from the GA forms, but the content is fully aligned.

1. The steps required for the application process are shown in a left-side menu panel. You can navigate with these links and jump around, completing the form in any order you like.
2. Steps 1 through 5 include form fields that align with the GA forms. You can jump around these steps filling in information as you acquire it from the applicant.
3. Step 6 allows you to review your draft application and check for errors or missing information.
4. Steps 7 through 12 will become unlocked as preceding steps are completed.

The screenshot shows a web interface for a 'Grant Application - Flintstone'. On the left is a vertical 'APPLICATION PROCESS' menu with 12 numbered steps. Step 1, 'Apply for Grant', is highlighted with a blue circle and a checkmark. Other steps include 'Beneficiaries', 'Potential claimants', 'Inventory - deceased', 'Inventory - jointly owned assets', 'Review draft and send', 'Certification', 'Submit and pay', 'Payment confirmation', 'Submit will', 'Serve notices', and 'Grant approval'. On the right is the main form area titled 'The deceased'. It contains several sections: 'Full legal name of the deceased' with input fields for 'First name' (Fred), 'Middle name or initial', and 'Last name' (Flintstone); a question 'Is the name on the will different from the legal name?' with 'Yes' and 'No' buttons; another question 'Is the name on the death certificate different from the names above?' with 'Yes' and 'No' buttons; a link '+ Add another name the deceased was known by'; a note about authorized alternate names; and a section 'Last address where the deceased habitually resided' with a checkbox 'the deceased did not reside in Alberta when they died' and two input fields for 'Address 1' (222 Boulder Ave) and 'Address 2'. At the top right of the form are buttons for 'Check for Errors', 'Save Progress', 'Next', and 'More options'.

5. You can click “Check for Errors” to find form fields that are incomplete.

You can save your progress at any time, allowing you to leave the application and return to it later.

Step 1: Apply for Grant

This step collects information about the preparer, the deceased, applicants, and, if applicable, will and other testamentary documents.

- If the preparer is an applicant, you must complete the address field before proceeding. If you are a lawyer or legal assistant you can disregard this step.
- Add information about the deceased.
- **TIP:** To avoid rejection, be sure to add Alternate names of the deceased, when the name in the will doesn't match the name on other documents.
- Select the Judicial Centre you believe to be correct. This will be updated by the reviewing clerk, if required. Applications will not be returned if the Judicial Centre is incorrect.

Adding applicants

When you add people to an application, you only need to enter their contact information once. After being entered, people can be added to different parts of an application. For example, a person could be an applicant and a beneficiary. You only need to add the details for that person once and they can be inserted into multiple parts of the application.

1. If you are the person preparing the application, you will automatically be entered as the first applicant. You can edit your address or priority to apply if required.
2. Click on “Select an applicant” and select “Add new...”
3. Enter the applicant's name and contact details in the popup.
 - a. **Grant of Administration** applications also require specifying the applicant's priority to apply, in accordance with Section 13(1) of the Estate Administration Act.
 - b. If the applicant is nominated, select “not related to the deceased”
 - c. Applicants require both an email address and physical address for service. Beneficiaries and other interested parties require either an email address or address for service.
 - d. **Trust Company** applicants **must** be registered under the Alberta Loan and Trust Corporations Act.
 - e. Once saved, an applicant can be added to other sections of the application, with all the details saved.

Resource: [“What to expect as an Applicant”](#) - a guide to help applicants understand what will happen.

Nominations

If the applicant is nominated by a person with priority to nominate:

1. In the Nominations section, click on “**Add person**”.
2. Add the person with priority who is making the nomination.
 - a. Enter the nominator’s name and contact details in the popup.
3. Add the person who is being nominated to act as the applicant.
4. A person with priority can nominate multiple.
5. You can choose from two options for adding a nomination:
 - a. **Digital nomination:** When the application is completed and you send it for certification, the nominator will receive an email notification containing a link. They simply need to click on the link and certify their intention to nominate. They will be able to download a PDF copy of the nomination for their records.
 - b. **GA13 upload:** If you prefer, you can upload a completed GA13.
6. You can add multiple nominators, if needed.

Resource: [“What to expect as a nominator”](#) - a guide to help renunciants and nominators understand what will happen if you proceed digitally, rather than by document upload.

Nominations
Persons making a nomination must have priority among applicants. There can be more than one nominator as long as they are equally the highest priority. People who are nominating do not need to renounce.

1 + Add person

Nominations
Persons making a nomination must have priority among applicants. There can be more than one nominator as long as they are equally the highest priority. People who are nominating do not need to renounce.

The nominator

Nominator
2 Select a nominator*

Nominee
3 Select a nominee*

4 + Add Nominee

Nomination method
5 Digital nomination
 GA13 upload
[Remove](#)

6 + Add person

Renunciations

If anyone is renouncing, you must identify them in your application.

1. In the Renunciations section, click on “**Add person**”.
2. You can also add a renunciation from the Public Trustee, if required.
3. Renunciants must be 18 years of age or over.
4. Add the person who is renouncing.
 - a. Enter the renunciant’s name and contact details in the popup.
5. You can choose from two options for adding a renunciation:
 - a. **Digital renunciation:** When the application is completed and you send it for certification, the renunciant will receive an email notification containing a link. They simply need to click on the link and certify their intention to renounce. They will be able to download a PDF copy of the renunciation for their records.
 - b. **GA11 upload:** If you prefer, you can upload a completed GA11.
 - c. Public Trustee renunciations can only be made by GA11 upload. There are no digital renunciations for the Public Trustee.
6. You can add multiple renunciants, if needed.

Resource: [“What to expect as a renunciant”](#) - a guide to help renunciants and nominators understand what will happen if you proceed digitally, rather than by document upload.

Renunciations
If the Applicant's priority to apply is dependent on the renunciation of other persons, identify those persons here. Do not add deceased persons.

1 2

Section 14 of the [Public Trustee Act](#) states that where a person dies anywhere leaving property in Alberta and a minor or a represented adult for whom the Public Trustee is trustee has an interest in the estate, the Public Trustee has the same priority to apply as the minor or the represented adult would have if they were an adult of full legal capacity.
Contact the Public Trustee to obtain a GA11 to be uploaded to SDS. (The Public Trustee can not renounce digitally)

+ Add person + Add Public Trustee

The renunciant

Is the renunciant 18 years of age or over?
3 Yes No

Renunciant
4 Select a renunciant*

Renunciation method
5 Digital renunciation
 GA11 upload
[Remove](#)

6 + Add person + Add Public Trustee

Bond or permission required (Applicant Residency)

The Surrogate Rules require that at least one applicant must reside in Alberta. If all applicants reside outside of Alberta, the applicant must either provide a bond or obtain permission from the Court to proceed, or request permission to proceed without a bond.

1. Select whether at least one of the applicant(s) resides in Alberta.
2. **If none of the applicants reside in Alberta**, indicate how the application proposes to meet the out-of-province requirement.

Note: SDS currently does not support submissions where a bond or other security is provided.

3. To request to proceed without a bond (bond waiver), add the consent of beneficiaries by clicking on “Add person”. You can also add consent from an entity, if applicable.
4. Add the consenting beneficiary:
 - a. Enter the beneficiary’s name and details in the popup window.
5. Choose one of the following options to add a consenting beneficiary:
 - a. **Digital consent:** When the application is completed and sent for certification, the consenting beneficiary will receive an email with a secure link. By clicking the link, they can certify their intention to consent and download a PDF copy of the certified consent for their records.
 - b. **GA14 upload:** Alternatively, you can upload a completed GA14 form.
 - c. **Note:** SDS currently does not support consent to waive bond from beneficiaries who are under 18 or are represented by the Public Trustee.
6. You can add multiple consenting beneficiaries as needed.
7. Provide a brief explanation of your proposal to waive bond in the **irregularities** field further down the page.

Resource: [“What to expect as a consenting beneficiary”](#) - a guide to consenting beneficiary to understand what will happen if you proceed digitally, rather than by document upload.

Other People with priority to apply (Grant of Admin or Admin with Will Annexed)

If there are people who have priority equal to or higher than the applicant(s), and they are not renouncing, they should be listed within this section. This includes someone who:

- Would have had priority but is deceased
- Was a minor on the deceased’s date of death
- Is an adult who lacks capacity to make decisions respecting financial matters
- Is an adult who cannot be located

TIP: The more information you provide to the Court, the less likely it is that a Justice will reject or seek additional information. This will speed your grant.

Bond or permission required (Applicant Residency)

Does at least one of the Applicant(s) reside in Alberta?

Yes No

Out-of-province applicant

The Surrogate Rules require that unless at least one of the applicants resides in Alberta, the applicant must provide a bond or obtain permission from the Court to proceed.

How does this application propose to meet the requirement for out-of-province applicants?

Provide a bond or other security

Request to proceed without a bond (bond waiver)

Consent of Beneficiaries to Waive Bond

When determining whether or not to require a bond, the Court will take into consideration if some or all beneficiaries have consented to proceed without a bond. Briefly explain your proposal in the irregularities field.

+ Add person + Add entity

Consenting Beneficiary

Select a beneficiary*

Consent method

Digital consent

GA 14 upload

Remove

+ Add person + Add entity

Uploading the will and other testamentary documents

The Will and other testamentary documents should include the required endorsements and signatures, per Surrogate Rule 16. If there are requirements missing, you must provide an explanation in the Irregularities section or your application will be rejected.

1. **View an example of the back of a will** showing the required Rule 16 endorsements: <https://surrogate.alberta.ca/rule-16>
 - a. Drag and drop or click to upload your file. Files must:
 - b. be PDF format
 - c. be standard letter sized (please avoid uploading scans with large dimensions)
 - d. contain bookmarks if greater than 25 pages
 - e. NOT have editable fields (as this may prevent the reviewing clerk from opening the file)
 - f. NOT be password protected
 - g. If there is any writing or marking on the back of any pages of the will, those pages **must** be included in the digital upload.
 - h. If the Rule 16 endorsements don't appear on the front of the will, you must scan the back of the last page of the will and include it in the upload.

Upload Will and other testamentary documents

Attach a scan of the most recent original will, along with any codicil or other document(s) that form part of the will. Note: the original will, any codicil(s) or other document(s) related to the will must be delivered to the Court once the application is approved by a Clerk. SDS cannot accept applications based on a copy of a will.

Will

Drag and drop or click to upload

Uploads must be PDF format. Recommended size is no larger than 20 MB per file. File size can be reduced using a PDF compressor.

Date of will

Enter or Select

MM/DD/YYYY

Does the upload include all Surrogate Rule 16 requirements?

Required: a witness' affidavit (usually in the form of a GA6 or GA9) as well as the corresponding exhibit stamp and signature on the will.

Yes No

Does the will mention a possible memo, list or other document?

To be incorporated by reference, a document must exist at the time the will was made. If the will refers to a memo the testator may leave, it does not need to be at the time the will was made and therefore is not a document incorporated by reference. If the clause is ambiguous, select option 2 and provide an explanation in the irregularities.

Yes. Documents incorporated by reference are attached as testamentary documents, as per Surrogate Rule 22.

Yes, but the terms of the clause do not incorporate the document(s), so they are not attached.

Yes, but after a search, no documents have been found.

No

Does the will include a survivorship clause?

A survivorship clause is a clause in the will that says that a beneficiary can only inherit if they live for a specified number of days after the person who made the will dies.

For example: \$1000 to my nephew Peter, if he survives me by 28 days

Yes No

The original will is written in:

English

French

Other

+ Add other document

If you need to add a codicil, memo, or any other document, click on “Add Other Document”. This will open a panel that will allow you to describe the document, enter a date, and upload a file. You can add as many additional documents as you need.

Uploading Supporting Documents

Optional documents can be uploaded to support an application.

1. Drag and drop or click to upload your file to the corresponding section on the page. Files must:
 - a. be PDF format
 - b. be less than 100MB in size
 - c. be standard letter sized (please avoid uploading scans with large dimensions)
 - d. contain bookmarks if greater than 25 pages
 - e. NOT have editable fields (as this may prevent the reviewing clerk from opening the file)
 - f. NOT be password protected
2. Select the Document Type. The following can be uploaded:
 - a. Affidavit
 - b. Cohabitation Agreement
 - c. GA12 Reservation of Right to Apply for a Grant
 - d. Invalid Will
 - e. Order
 - f. Prenuptial Agreement
 - g. Previously filed documents
 - h. Other (description required)
3. You can remove an uploaded document if needed.
4. You can add as many supporting documents as needed.

DO NOT upload the following, as your application will be rejected:

- C Forms,
- Proposed Orders

Chambers Applications

Supporting documents (optional)

- You can file additional documents that support your application, but which are not incorporated by reference in the will
- Do NOT upload the following documents:
 - Contentious Forms (C Forms)
 - Proposed orders
 - Chambers applications
 - GA11 renunciation form
 - GA13 nomination form
- Originals of these documents **should not** be submitted to the Court for storage.

Supporting document

Drag and drop or click to upload

Uploads must be PDF format. Recommended size is no larger than 20 MB per file. File size can be reduced using a PDF compressor.

Document type

Select*

Remove

+ Add other document

Express Authorizations

An express authorization from the Court may be required by a digital asset provider to enable a personal representative to deal with the digital assets of the deceased (e.g. email or social media accounts).

Person filing the application can enter requested express authorization text. If approved, the requested text will appear on the face of the Grant.

To avoid rejection the requested text **MUST** pertain to express authorization pertaining to digital assets.

Express authorizations – digital assets

An express authorization from the Court may be required by a digital asset provider to enable a personal representative to deal with the deceased's digital assets (e.g., email or social media accounts). Approved text will appear on the face of the Grant.

Requested express authorization text

Max 5000 characters

Explaining irregularities or special circumstances

In each of the main sections of the application, there is a field for you to explain irregularities or provide pertinent information to the Justice. Use these fields to provide information to the Court that helps clerks and Justices to understand discrepancies.

All irregularity explanations will be visible to both the review clerk and the Justice.

Each irregularity field allows a maximum of 2500 characters. Be brief and clear.

Irregularities

Are there any irregularities pertaining to any other supporting documents as part of this Grant application?

Max 5000 characters

Beneficiaries

There are three different types of beneficiaries, depending on the type of grant you are applying for.

- Beneficiaries of a **specific gift**
 - Displays only when the application includes a will (Probate or Administration with Will Annexed)
 - Specific gifts are optional.
- Beneficiaries of **residue**
 - Displays only when the application includes a will (Probate or Administration with Will Annexed)
 - At least one residuary beneficiary is required.
- Beneficiaries on **intestacy**
 - Displays when there is no will, or when the will doesn't address the entirety of the residue of the estate (patril intestacy).
 - If beneficiaries on intestacy display, at least one is required.

You will only see the beneficiary types that apply to your grant type, as determined by the initial screening questions. To avoid rejection, be sure to add beneficiaries in the correct section.

1. Select "Add a person" to add a person as a beneficiary. See the next page for details on adding a person.
2. Select "Add an entity" to add a charity or organization as a beneficiary.
3. Each beneficiary section has its own Irregularities area.

You can add as many beneficiaries as required.

Beneficiary information is used to generate notices.

- If a beneficiary has an email address, they will be served digitally by SDS.
- If beneficiaries don't have an email address, you must serve using other methods and certify service in SDS (see section about [Serving Notice](#))
- If the information you provide about the beneficiary indicates that the Public Trustee must be served, SDS will do that automatically (see section about [Serving the Public Trustee](#))

GA20 Affidavit of Trustee: Although there may be a requirement to obtain a GA20 in certain circumstances, there is no requirement to file the form with the Court.

Beneficiaries when there is a will

Add beneficiaries in the same order as they are listed in the will.

Describe the gift or portion of the residue the beneficiary is to receive.

1. **Beneficiary of Specific Gifts.**
2. Describe the gift.
3. Indicate if a specific gift has been adeemed or is to be held in trust.
4. Add additional people or entities that are to receive specific gifts.
5. **Beneficiary of Residue.**
6. Describe the gift.
7. Indicate if the residue is to be held in trust.
8. Add additional people or entities that are to receive residue.

Residuary beneficiaries

The following persons are beneficiaries who are to receive a residual share of the deceased's estate under the deceased's will. Persons who are to receive a residual share will receive Notice of this gift. Residue may be described in the will as "residue of my estate" or "anything left over".

+ Add a person + Add an entity

1 2

Irregularities

To avoid rejection, if any of the following are true, please explain:

- Residue in the will doesn't match residue in the application
- Residue doesn't add up to 100%
- The will or application fails to address residue
- Residue is given to a beneficiary in a document other than the will (ie: in a memo)

Are there any irregularities relating to the residue?

3

max 5000 characters

TIP: If the gift description differs from what is in the will, provide an explanation in the Irregularities section.

Beneficiary – Ben Ificiary 1

Name	Email	Address for service	Person type
Ben Ificiary	dennis@breenconsulting.ca	12345- 67 Ave Edmonton AB T8N 9T0 Canada	Adult

Notice recipients

Description of gift(s)
 Please provide the description of the gifts listed in the will, including the item or amount of money, who the gift is to be given to, and any other instructions that are provided in the will regarding the gift. Description provided should align with information in the will. Adeemed gifts: Adeemed refers to an item having been sold, given away, converted or destroyed during the lifetime of the deceased.

Gift

Gift description	<input type="checkbox"/> Adeemed	<input type="checkbox"/> Held in trust
Birch bark canoe 2		3

4

Residuary beneficiaries 5

The following persons are beneficiaries who are to receive a residual share of the deceased's estate under the deceased's will. Persons who are to receive a residual share will receive Notice of this gift. Residue may be described in the will as "residue of my estate" or "anything left over".

Beneficiary – Rezzy Doe

Name	Email	Address for service	Person type
Rezzy Doe	dennis@breenconsulting.ca	222 Street Ave, Edmonton AB T3T 3T3 Canada	Adult

Notice recipients

Share of residue
 Total residual shares allocated to the residuary beneficiaries usually adds up to 100% or the residue is divided into 'shares or proportions' which captures all of the residue. Description provided must align with how the residue is allocated in the will.

Description of proportion*
 100% of the residue of the estate 6 Held in trust 7

* as percentage, fraction, max 70-69 characters.

8

Beneficiaries on intestacy

1. Beneficiary on intestacy
2. When you add beneficiaries on intestacy, you must select their relationship to the deceased from a menu.
3. If the beneficiary is a child, grandchild or other descendant of the deceased, you must also indicate if they are a child of the surviving spouse or Adult Interdependent Partner.
4. Describe the gift (i.e. percentage or share of the estate)

Select the applicable section of the Wills and Succession Act

Beneficiary – Bobby Deadman

Name: Bobby Deadman | Email: demis@breenconsulting.ca | Address for service: 14406 823 Ave, Edmonton AB, T6N 0T2, Canada | Person type: Adult

Relationship to deceased: Child of the deceased

Relationship to spouse or AIP of the deceased:

 There is no surviving spouse or AIP

 This person is a child or other descendant of the surviving spouse or AIP

 This person is not a child or other descendant of the surviving spouse or AIP

Gift: Description of gift*

Applicable section of the [Wills and Succession Act](#)

Adding a person as a Beneficiary

When you add a person, you must choose one an option that best describes them. This selection is used to determine how service will be effected.

1. **Minor** on the date of the deceased’s death, the Public Trustee is automatically served by SDS. You **do not** need to complete a GA4.
 - a. If you select this option, you must enter the person’s date of birth. If you don’t know the date of birth, enter an estimate and explain in irregularities.
 - b. If the person is still a minor when the application is created, you need to select their relationship to the deceased. You also have the option to enter names of Guardians. Guardians will be served on behalf of the minor.
 - c. If the person is no longer a minor, they will be served personally.
2. **Lacks capacity to make decisions respecting financial matters:** you will be asked if the Public Trustee has been officially appointed as their trustee.
 - a. If yes, the Public Trustee will automatically be served.
 - b. If no, you can indicate if they are represented by a different trustee or attorney. If you enter a trustee or attorney, they will be served on behalf of the person. If they are not represented, the person will not be served.
 - c. NOTE: The Public Trustee will only accept service if they have been officially appointed as a person’s trustee. Serving the Public Trustee in error will delay your Grant.
3. **Cannot be located:** you will be asked if they have been declared by the Court to be a missing person under the Public Trustee Act.
 - a. If yes, the Public Trustee will automatically be served.
 - b. If no, the person will not be served.
4. If the person is not described by any of these special circumstances, select “None of the above”.

Resource: [“What to expect as a Beneficiary”](#) - a guide to help beneficiaries understand what will happen.

Add recipient

Full legal name: First name*, Middle name or initial, Last name*

+ Add other names known by

Relationship to deceased: Select*

This person: *

Was a minor on the date of the deceased's death

 Is an adult who lacks capacity to make decisions respecting financial matters

 Is an adult that cannot be located

 None of the above

Potential claimants

In this section you will be asked a series of questions pertaining to either:

- Part 5 of the *Wills and Succession Act*, or
- the *Family Property Act*

Depending on how you answer these questions, people may be identified as potential claimants.

Information from this section will be used to generate notices to potential claimants.

- If the individual has an email address, they can be served digitally.
- If potential claimants don't have an email address, you must serve them by another method and certify service on **Step 11: Service Notices** (see section about [Serving Notice](#)). Applications will not be reviewed by a Justice until all service is complete.
- If the information you provide about the potential claimant indicates that the Public Trustee must be served, SDS will do that automatically (see section about [Serving the Public Trustee](#))
 - If the Public Trustee is served, you do not need to complete a GA4. Once complete, the Public Trustee's response will be available in the Documents panel of the application.
- Be sure to explain any irregularities. For example, if the deceased had a spouse that either predeceased the testator or is presently deceased.

Resource: "[What to expect as a Potential Claimant](#)" - a guide to help Potential Claimants understand what will happen.

Sole Beneficiaries

The Estate Administration Act provides an exemption that makes it unnecessary to serve certain family members as a potential claimant under Part 5 of the Wills and Succession Act and/or the Family Property Act when they are entitled to receive the entire estate.

This applies only to sole beneficiaries who are identified as the deceased's:

- Spouse,
- Adult Interdependent Partner,
- Former Spouse, OR
- Former Adult Interdependent Partner

1. Add a Spouse, Adult Interdependent Partner, Former Spouse, or Former Adult Interdependent Partner to the Potential Claimants section of the application and click "Save Progress".
2. SDS will detect when this Spouse/AIP/Former spouse/Former AIP is the sole beneficiary identified from Step 2: Beneficiaries, and will indicate that they will be served as the sole beneficiary, but not as a potential claimant.
3. The "Notice Recipient" indicator will show "Sole Beneficiary".
 - a. If the Public Trustee, an attorney or trustee is served on behalf the beneficiary, the tag will also update:
 - i. Sole Beneficiary % Public Trustee
 - ii. Sole Beneficiary % Attorney
 - iii. Sole Beneficiary % Trustee

When this person is later served as a Beneficiary, the Notice will no longer contain clauses identifying them as a potential claimant.

Inventory

- Steps 4 and 5 collect information about the deceased's assets and liabilities. Your entries determine the **value of the estate** and allow SDS to **serve the inventory to beneficiaries and interested parties** who are entitled to see it. Inventory values are also used to automatically calculate the application fee, which is charged when you submit the application to the Court.
- For each of the asset sections, click "Add item" to add an asset. You can add as many assets as you need.
- If the value of the asset is unknown at the time of application, you can indicate that the value is "TBD". Your application can be submitted and a grant issued while it contains TBD values. After the grant is issued, you will be required to amend the inventory, get it certified by the applicant and serve Notice of Amended Inventory to beneficiaries and interested parties (see the section on [Amending the inventory](#) for details).
- If you've added an item that isn't needed, it can be removed.

The inventory includes 7 sections for different asset types and 1 section for liabilities. For each asset, you must identify if it is located outside of Alberta

- if outside of Alberta:** the value of the asset will NOT be used in calculating the surrogate fee, but WILL be included in the total value of the estate disclosed to beneficiaries and interested parties.

if within Alberta: the value of the asset WILL be used in calculating the surrogate fee, and will be included in the total value of the estate disclosed to beneficiaries and interested parties.

Review draft and send

Step 6: Review draft and send, provides you with a complete summary of the draft application. It is also where you go to take actions on the application, such as:

- Downloading a draft to print
 - Responding to a Justice or clerk after a submitted application has been returned
 - Requesting certification from applicants, renunciants or nominators
- Once the application is complete and there are no errors, click "Request certification". This will automatically send an email to the applicant(s), who can click a link to review the application online and digitally certify with a click.
 - If your application includes digital renunciations or nominations, those certifications will be sent and completed before the applicants receive their digital certification email. See: [Nominations section](#) or [Renunciants Section](#) for more information.

- Click "Preview draft" to access a **downloadable PDF** of the application. You can print the document to share with your client in a face-to-face meeting prior to certification.

As you review the application summary, you can click "Edit" to jump to the appropriate step to make changes.

Errors and warnings

Errors

SDS displays error messages if any required information is incomplete. **You cannot submit your application until all errors have been corrected.** Examples of errors include:

- Information missing from a required field.
- Multiple renunciations or nominations for the same person.
- On applications that have a will, not including at least one residuary beneficiary.
- On applications without a will, not including at least one beneficiary on intestacy.

Warnings

On applications with intestacy, SDS also provides a limited number of “warnings”. Warnings highlight that your application includes entries that are somewhat unusual. However, **you are free to ignore warnings and submit your application.** If you submit an application that has triggered warnings you are strongly encouraged to provide an explanation in the irregularities.

Examples of warnings include:

- Adding a person in the “priority to apply” section whose relationship to the deceased suggests they may also be a beneficiary, but not including them as a beneficiary.
- Adding a renunciation or nomination for a person that does not have priority to apply.

The screenshot displays the 'Grant Application – Deadman' interface. On the left, the 'APPLICATION PROCESS' sidebar shows steps: 'Apply for Grant' (1), 'Beneficiaries' (4), 'Potential claimants', 'Inventory – deceased', 'Inventory – jointly owned assets', 'Review draft and send', and 'Certification'. The main content area is divided into two sections. The top section, 'The deceased', has a red error message: 'There were problems with the following fields. You must resolve them in order to proceed.' with a bullet point: 'First Name' must not be empty. (2). Below this, the 'Full legal name of the deceased' form has a red error message: 'First name' (3) Middle name or initial (4) Last name (5) Deadman. The bottom section, 'Beneficiaries on Intestacy', has a yellow warning message: 'Potential issues detected. If these are not errors, you may proceed.' with a bullet point: 'Based on the people recorded in Step 1, it's possible that the following people should also be beneficiaries on intestacy. Please ensure that the application complies with the Wills and Succession Act.' with a sub-bullet: 'Abe-Lee Kant'. Below this, the 'Beneficiary – Missy Deadman' is listed. The interface includes buttons for 'Check for Errors', 'Save Progress', 'Next', and 'More options'.

1. If there are errors in a section of the application, that section will display in red in the navigation.
2. Errors will display in a red box at the top of the section.
3. The specific part of the application that triggered the error will also be highlighted in red.
4. If there are warnings in a section of the application, that section will be highlighted by a yellow underline. Warnings will display in a yellow box at the top of the section.

What people can expect

Renunciations, Nominations, Beneficiary Consent to Waive Bond

If your application includes digital renunciations, nominations, and/or beneficiary consents, these requests will be sent automatically when you click **“Request certification”** on the **“Review draft and send”** step.

Recipients (renunciants, nominators, or consenting beneficiaries) will receive an email notification with a secure link to a page where they can complete their renunciation, nomination, or consent.

Note: Nominations and renunciations must be completed before beneficiary consent requests are sent out.

1. Email Notifications:

- Each email request expires after 72 hours (3 days).
- Recipients receive a reminder email every 24 hours until the request expires.
- If a request expires before certification is completed, you can re-send it (and edit the recipient’s email address, if needed) from the **“Certification”** step.

2. Renunciation / Nomination / Consent Page:

When the recipient clicks the link in the email, they are directed to a secure web page where they can view:

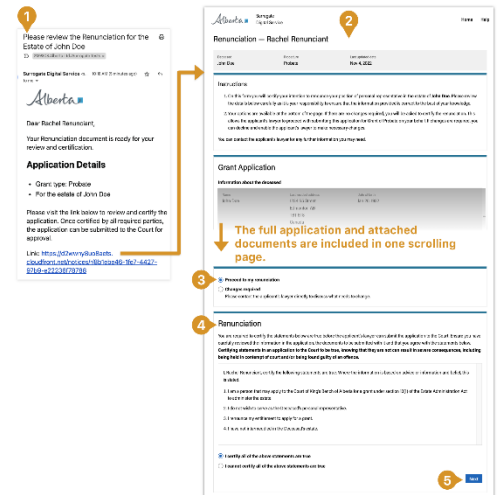
- a. Relevant sections of the Grant application
- b. Attached documents (e.g., Will, codicil, etc.)
- c. A certification statement if the recipient is satisfied, they can proceed. If they aren’t ready to renounce/nominate, they can choose **“Changes required”**, which will send the application back to you.

3. Request Review: If the recipient is ready to proceed, they can continue with their renunciation, nomination, or consent. If they require changes before proceeding, they can select **“Changes required”**, which will return the application to you for edits.

4. Certification Statement: After reviewing the information and certification statement, the recipient can certify or decline their renunciation, nomination, or consent.

5. Completion: Recipients must click **“Next”** to finalize the process. Once completed, they can download a PDF copy of their certified document for their records.

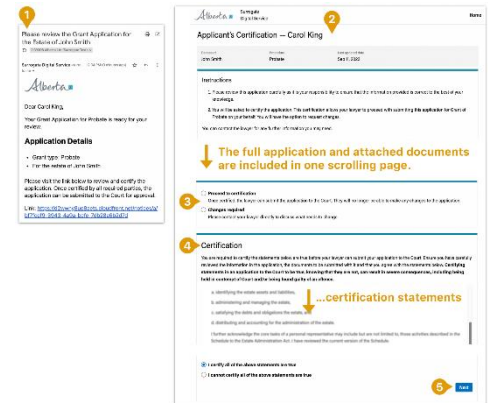
After all renunciations, nominations, and beneficiary consents are complete, SDS automatically sends a certification notice to the applicants by email.



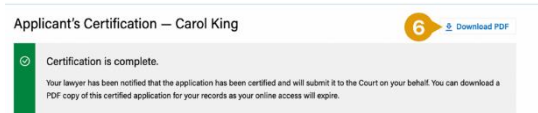
Applicant certification

When you click “Send to applicant” on the “Review draft and send” step, SDS generates an email to the applicant(s). The email includes a link to a web page where they can view and certify the application. The status of the application changes to “Pending Certification”.

1. **Email to applicant(s):** Expires after 72 hours (3 days). The applicant will be sent a reminder email every 24 hours until expiry. If the notice expires before the certification is completed, it can be resent (and the email address edited) from the “Certification” step.
2. **Certification page:** When the applicant clicks on the link in the email, they go to a web page where they can view:
 - a. the complete Grant application
 - b. attachments included in the application (Will, codicil, etc.)
 - c. certification statement



3. If the applicant is satisfied with the application, they can **proceed to certification**. If the application needs changes, the applicant can choose “**Changes required**”, which will notify you by email so you can revise the application.



4. **Certification:** After reading the certification statements, the applicant can certify or decline.
 - a. If they certify, it will be recorded by SDS and the application will be sent to the Court for clerk review. You and the applicant can download a PDF of the certified application.
 - b. if there are multiple applicants, ALL applicants must certify before the certified application can be downloaded
 - c. if an applicant certifies, but another declines, the initial certification will be canceled.
 - d. If the applicant does not certify, you can revise the application and re-send it for certification.
5. The applicant must click “Next” to complete the process.
6. After the applicant certifies, they can download a PDF copy of their certified application.
7. After all applicants have certified, the status of the application changes to “Ready to submit”.

Tracking and managing certifications

You can manage and track the status of nominations, renunciations, beneficiary consents to waive bond, and applicant certifications on the Certification screen (Step 7). Once all applicants have completed their certifications, the application status will update to “Ready to submit.”.

1. Names of nominators, renunciants, consenting beneficiaries, and applicants
2. Type of requests
3. Date of requests were sent
4. Expiry date of requests — they expire after 72 hours (3 days)
5. Status of each request:

- **Pending:** The request has been sent automatically via email and is awaiting response.
- **Complete:** The request has been completed.
- **Expired:** The certification request has expired; you can re-send it.
- **Changes requested:** The nominator or renunciant has requested changes to the application, which is now editable for any necessary updates.
- **Declined:** The consenting beneficiary has declined the request.
- **Request cancelled:** The request has been cancelled; the beneficiary can no longer respond.

6. When you click “Re-send...,” you can edit the email address before sending a new request.
7. Pending or expired beneficiary consent requests can be cancelled by clicking on “Remove”.

Certification Stages

There are three possible certification stages that may need to be moved through:

- a) If there are any nominations or renunciations, those are sent first. Once they are all complete, the service will automatically move on to the next stage.
- b) Next, if the application is requesting permission to proceed without a bond, digital beneficiary consent to waive bond requests must be completed.
- c) Finally, applicant certification requests are sent. Once complete, the application will be ready to submit.

TIP: If the certification email is not received, ask the applicant to search their inbox for “*Surrogate Digital Service*” SDS emails are sometimes filtered to junk or spam folders. Edit the applicant’s email address and click “Re-send...” to send the notice to an alternate address. If the issue persists, contact JSG.SurrogateSupport@gov.ab.ca for assistance.

Nomination
All nominators must verify that they are waiting before the application can be sent to applicants. You will be notified by email if any nominators request changes.

Nominator	Type	Date sent	Expiry	Status
Charlie Doe	Nomination	Oct 5, 2025	Oct 5, 2025	Nomination complete

Renunciation
All renunciants must verify that they are renouncing before the application can be sent to applicants. You will be notified by email if any renunciants request changes.

Renunciant	Type	Date sent	Expiry	Status
Lucy Doe	Renunciation	Oct 5, 2025	Oct 5, 2025	Pending

Beneficiary consent to waive bond
All beneficiary consent requests must be completed before the application can be sent to applicants for certification. Incomplete requests can be removed to proceed without that party's consent to waive bond.

Beneficiary	Type	Date sent	Expiry	Status
Charlie Doe	Consent to waive bond	Oct 8, 2025	Oct 8, 2025	Pending
Lucy Doe	Consent to waive bond	Oct 8, 2025	Oct 8, 2025	Pending

Applicant certification
All applicants must certify the application before it can be submitted. You will be notified by email if any applicants request changes.

Applicant	Type	Date sent	Expiry	Status
Paul Smith	Certified Application	Oct 8, 2025	Oct 8, 2025	Pending

Submit and pay

When all certifications are complete, the application status changes to “Ready to submit”. You will receive an email notification of this status change. Open the application and go to Submit and pay (Step 8).

1. The application status displays as “ready to submit” on your dashboard.
2. Enter your credit card information and click “Pay”. Your credit card is charged instantly. There is no pre-authorization period. You will receive an email notification confirming submission.
3. When payment is complete, the “Submit and pay” screen will display your payment confirmation. This is your receipt. If needed, you can print this page for your accounting records.

When payment is complete, the status changes to “Submitted” and the application is sent to the Court for clerk review. When a clerk completes their review and approves the application, a DES file number is assigned and SDS automatically emails notices to beneficiaries and other interested parties.

Applications
Wills, estates & trusteeships

Date modified	Lawyer file no.	File number	Applicant(s)	Deceased	Status 1
Mar 13, 2024	---	---	Kant, Abe-Lee	Deadman, Guy	Ready to Submit

Grant Application – Deadman Admin Ready to Submit Pay More options

3 | Documents

APPLICATION PROCESS

- Apply for Grant
- Beneficiaries
- Potential claimants
- Inventory – deceased
- Inventory – jointly owned assets
- Review draft and send
- Certification
- Submit and pay**
- Payment confirmation
- Serve notices
- Grant approval

Processing fee

Total **\$35.00**

Name on card

Card number

Expiration date CVV

Back Pay 2

Grant Application – Deadman Admin Submitted 3 Next More options

3 | Documents

Payment Confirmation

Details of the payment transaction are below.

*PLEASE NOTE: Previous fee payments are not refundable for Surrogate fees if the value of the estate decreases as a result of inventory amendment. Please contact your local court office should you have any concerns.

File number	Applicant	Grant type	Estate
---	Abe-Lee Kant	Admin	Guy Deadman

Judicial centre	Lawyer file number
Calgary	---

Estate value	Fee
\$10,000 or less	\$35.00

Date	Card type	Card number	Order number
Mar 13, 2024, 6:31:18 AM	MasterCard	**** * 1004	DES-46E7829-DTCC-4CE9

Transaction ID	Amount	Status
10002490	\$35.00	Paid

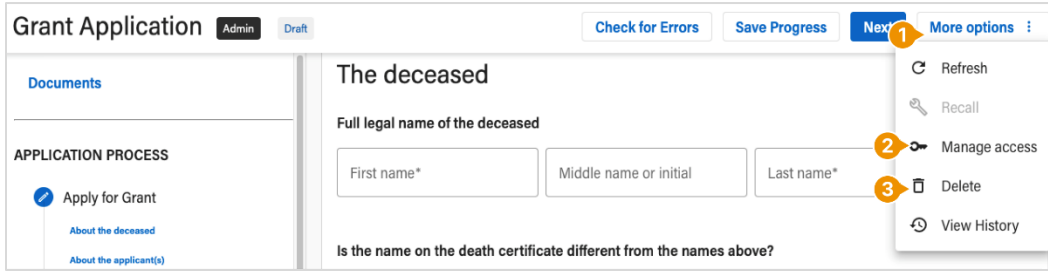
APPLICATION PROCESS

- Apply for Grant
- Beneficiaries
- Potential claimants
- Inventory – deceased
- Inventory – jointly owned assets
- Review draft and send
- Certification
- Submit and pay**
- Payment confirmation
- Serve notices
- Grant approval

Deleting a draft application

You can delete applications that are in “Draft” status.

Click “More options” and select “Delete”. Deleted applications cannot be recovered.

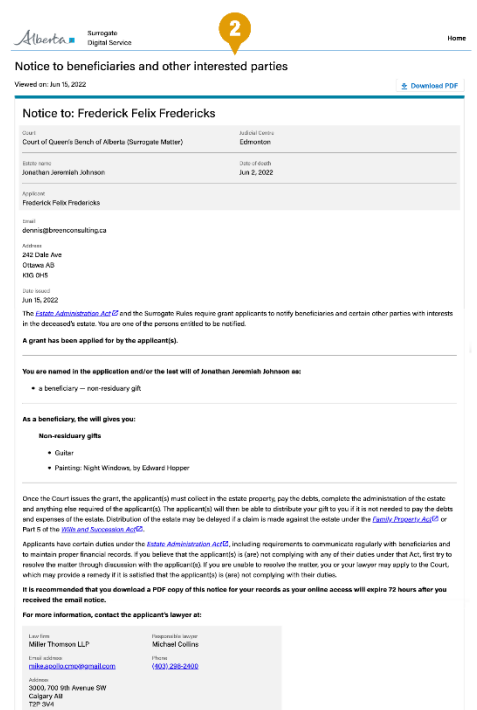
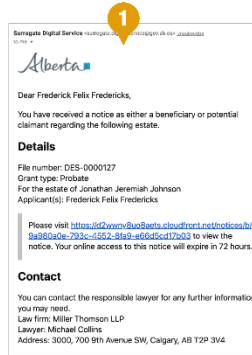


Serving Notices

Digital notices are automatically generated based on information entered in the application. Notices are served after the clerk has completed their review and approved the application.

SDS automatically sends digital notices to all Beneficiaries and Potential Claimants for whom you have entered email addresses. If you have not entered an email address for a Beneficiary or Potential Claimant, you must print the notice, serve it manually, and certify service in SDS. See: [Tracking and managing notices](#).

1. **Email providing access to the notice.** If the recipient clicks on the link, the digital service records this action as completing service.
2. **Notice that opens from the email link.**
 - a. Access to the Notice **expires** after 72 hours for security reasons.
 - b. Email reminders are sent to the recipient every 24 hours until expiry.
 - c. If a notice expires you can resend it from the “Serve notices” step. See: [Tracking and managing notices](#).



Notice recipients can view:

- Notice information that pertains to them
- Grant application (not seen by beneficiaries of specific gifts)
- Inventory (not seen by beneficiaries of specific gifts)
- Will and other testamentary documents (not seen by beneficiaries of specific gifts)
- A list of other beneficiaries or other interested parties that will receive notice
- if a person is more than one recipient type (e.g. they are a residuary beneficiary AND a potential claimant), they will receive a single, combined notice.

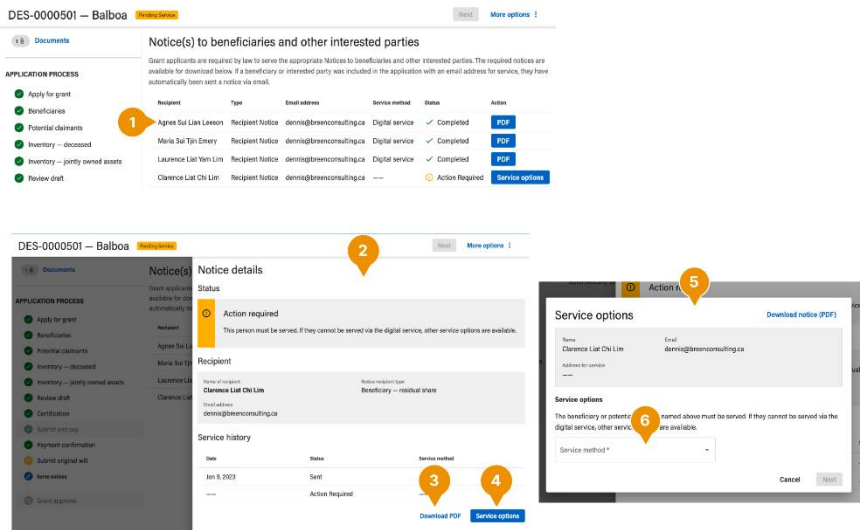
Resources: to help beneficiaries and potential claimants understand what will happen:

- [What to expect as a Beneficiary](#)
- [What to expect as a Potential Claimant](#)

Tracking and managing notices

The person preparing the application can track and manage service on Step 11: Serve Notices. Notices can have the following statuses:

- **Pending:** digital notice has been sent but it has not yet been viewed/completed
- **Action required:** digital service was not attempted (no email address entered). You must serve by another method and update SDS to indicate the method and date of service.
- **Expired:** digital access expires after 72 hours. You must attempt digital service again, or choose an alternate method
- **Completed**
- **Invalid:** this may occur if an application was halted after service, or if digital service failed.



1. For each recipient, you can see if service is complete or pending. Click on a recipient to manage service (See bullet 2).
2. Notice details panel.
3. From the Notice details panel, you can download a PDF of the notice and print it out, should non-digital service be required.
4. Click Service Options to open a popup where you can resend digital notices (including editing the email) or certify service by an alternate method (see bullet 5)
5. Service options popup.
6. Select the service method you used. If it was a non-digital method, indicate the date of service.

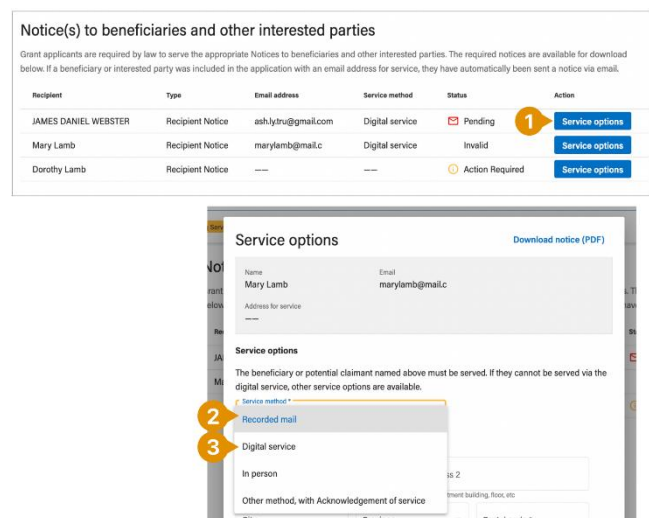
Alternate options include Recorded mail; Acknowledgment of Service, and In person.

Editing contact information for service

When an application is “Pending Service”, you can edit the contact information for beneficiaries and other interested parties. Go to Serve Notices (Step 11).

1. **“Service Options”** will launch a pop-up window where you can change the selected recipient’s contact info or service method.
2. **Recorded Mail:** Allows you to add or edit an address for service, so that you can certify that you have completed service to the selected recipient.

Digital service: Allows you to add or edit an email address for digital service. The notice will be generated digitally.



Serving the Public Trustee

SDS collects all the information needed to determine if the Public Trustee must be served and provides that service automatically.

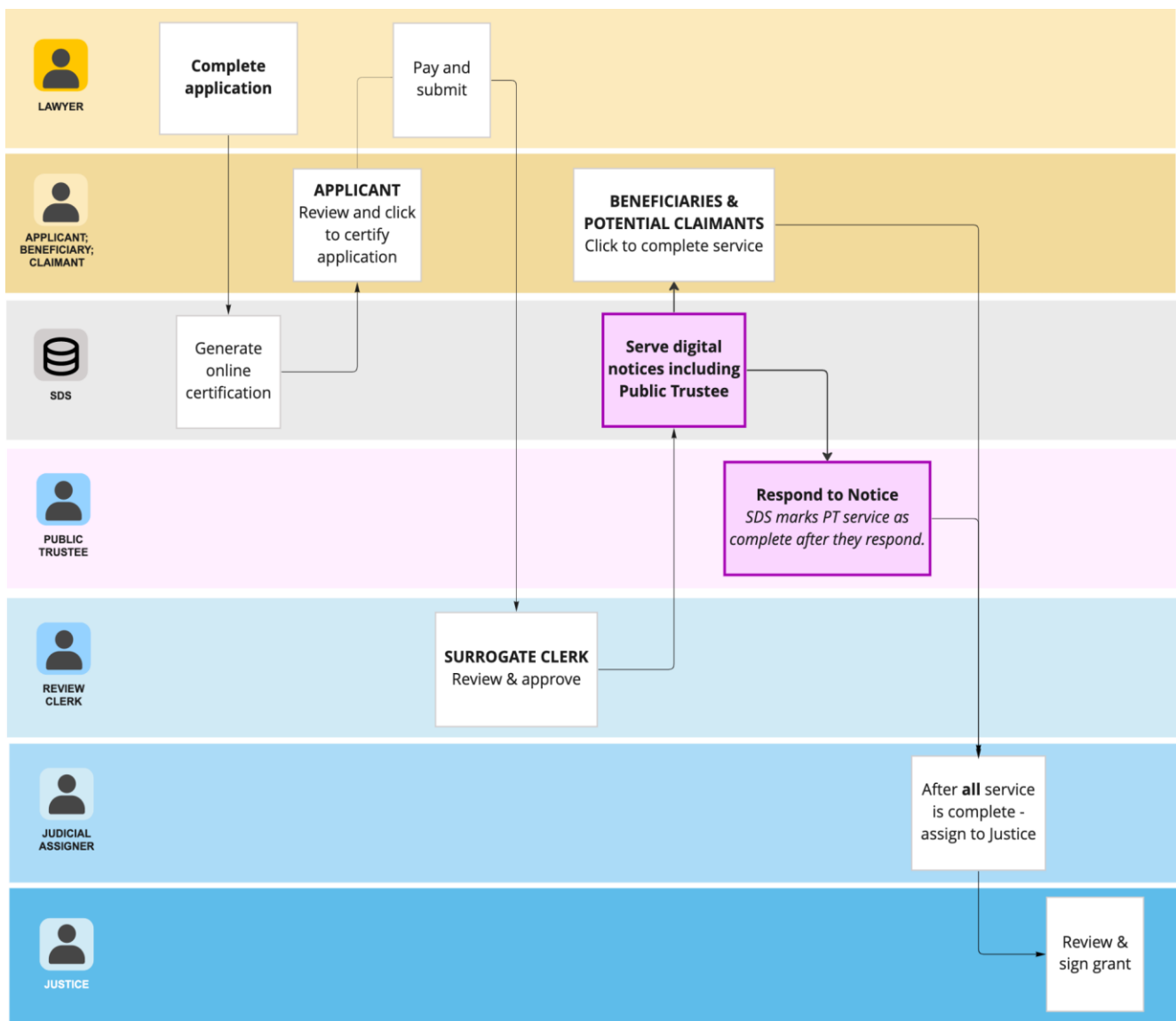
- **DO NOT** complete a GA4 and serve it on paper to the Public Trustee. It will be rejected and will slow the overall process.
- SDS automatically serves the Public Trustee only when there is a requirement to do so. You **cannot** choose to serve the Public Trustee out of an abundance of caution.

When Guardians for minors are added to an application, SDS serves them automatically, provided an email address has been entered.

Process

As illustrated on the right, all notices, including those to the Public Trustee, are served **after** clerk review. Service to the Public Trustee is not considered complete until they have submitted their response in SDS. When the Public Trustee responds, you will receive a notification email and you will be able to download their response from the documents panel of the application (See [Response from the Public Trustee](#)).

Applications requiring service to the Public Trustee will take longer to process than applications without that requirement.




Response from the Public Trustee

When the Public Trustee is served notice on an application, they review the notice and provide a response. The Public Trustee’s response is made available to you in SDS.

1. When the Public Trustee completes their review, you will receive an email notification that the response is available. Sign into SDS to view the response.

The Public Trustee’s response documents will be available in the Documents panel of the application. Click on “Documents” in the upper right (above the application process navigation) to open the Documents panel.



Dear Dennis Breen,

The Public Trustee has reviewed your notice and provided a response to the Court.

You can log in to the Surrogate Digital Service at <https://d335v8z2ij69rx.cloudfront.net> to view or download a PDF of their response by going to the application’s Documents tab.

Application Details

Grant type: Probate
 For the estate of Michael Collins
 Applicant(s): Edwin Aldrin Jr.

1

DES-0000586 – Collins Pending Final Decision Next More options

7 Documents

APPLICATION PROCESS

- ✔ Apply for grant
- ✔ Beneficiaries
- ✔ Potential claimants
- ✔ Inventory – deceased
- ✔ Inventory – jointly owned assets
- ✔ Review draft
- ✔ Certification
- ✔ Submit and pay
- ✔ Payment confirmation

Notice(s)

Grant applican available for d automatically t

Recipient

Bootsy Coll

Joan Collins

Colin Collin Collins

Callie Collir Collins

Public

Grant of probate application

Document type	File name
Certified Application	CertifiedApplication_CollinsMichael.pdf
Notice to Beneficiaries and Other Interested Parties	DES-0000586_Notice_CollinsBootsy.pdf
Notice to Beneficiaries and Other Interested Parties	DES-0000586_Notice_CollinsColin.pdf
Notice to Beneficiaries and Other Interested Parties	DES-0000586_Notice_CollinsCallie.pdf
Notice to Beneficiaries and Other Interested Parties	DES-0000586_Notice_CollinsJoan.pdf
Public Trustee Letter	PublicTrusteeLetter_2023-02-06.pdf
Public Trustee response	DES-0000586_PublicTrusteeResponse_CollinsMichael.pdf

2

Recalling an application

If you need to make changes to an application after it's been sent for certification or clerk review you can recall it. Applications can be recalled when they are in one of the following statuses:

- Pending Certification
- Ready to Submit
- Submitted
- Pending Service

Recalling an application sets the status to “Draft”, which allows you to make changes. After making changes:

- The applicant(s) must re-certify the application. Any previous certifications are invalid.
- If a clerk has already approved the application, Notices will be re-served. All previously completed service is invalid.

If your changes result in a fee increase, you must pay before submitting the application.

Alberta Surrogate Digital Service Dashboard

Grant application — Ross Pending Certification

APPLICATION PROCESS

- ✓ Apply for grant
- ✓ Beneficiaries
- ✓ Potential claimants
- ✓ Inventory — deceased
- ✓ Inventory — jointly owned assets
- ✓ Review draft
- ✗ Certification

Applicant certification

All applicants must certify the application before it can be submitted by email if any applicants request changes.

Applicant	Type	Date sent	Expiry	Status
[Redacted]	Certified	Sep 11, 2022	Sep 14, 2022	Pending
[Redacted]	Application			

[Re-send](#)

More options

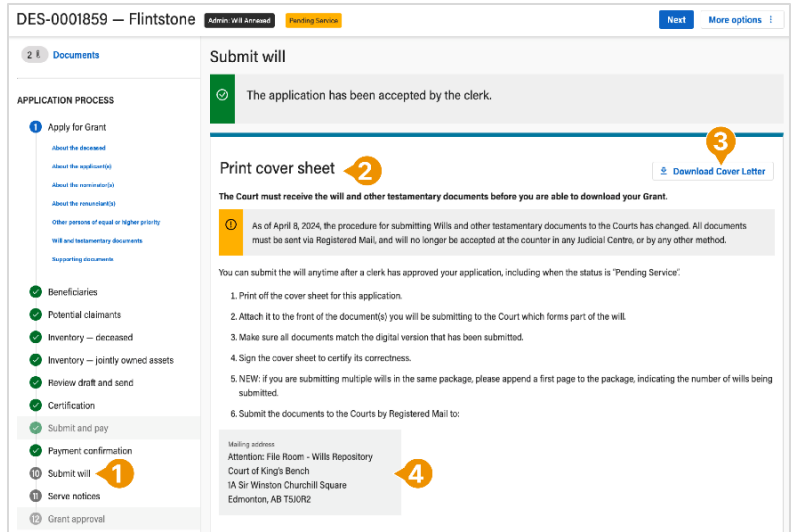
- Refresh
- Recall
- View History

Submitting the will and testamentary documents

For Probate or Administration with Will Annexed applications, the Will and other testamentary documents must be submitted **by Registered Mail only** to the Court for storage. You cannot download a Grant until the Court has received these documents - even if the application has been approved by a Justice.

Do not submit the will and testamentary documents until your application has been approved by a clerk.

1. **Submit will.** When your application is approved by a clerk, you will receive an email notice. Go to “Submit Will” to download a cover sheet that must be signed and attached to the will and testamentary documents that are submitted to the Court for storage.



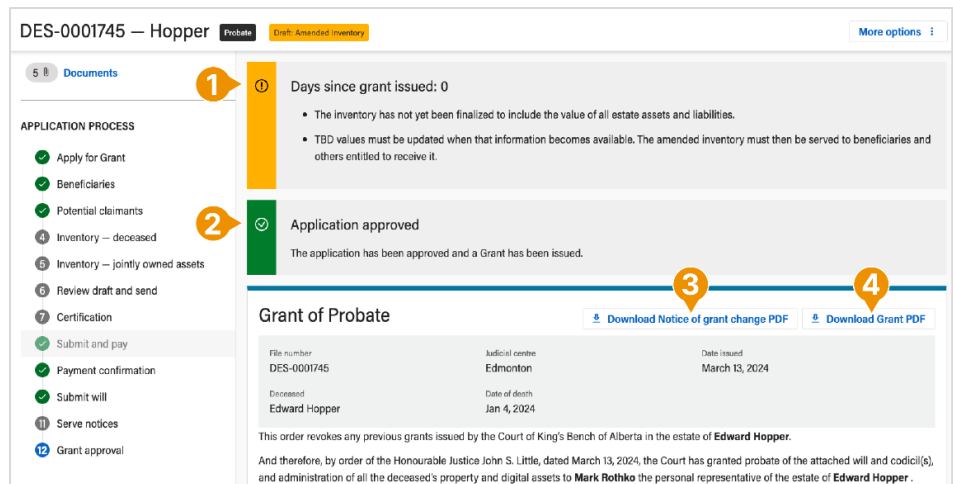
2. Instructions for cover sheet.
3. Download the cover sheet. The preparer (or another lawyer in the same law office) must sign the certification statement on the cover sheet. The certification must be signed with an ink signature. It is not a digital certification.
4. Address where the documents must be **sent by Courier with signature only**.

As of December 2, 2025, all documents must be submitted to the Court via Courier with signature only. Documents will no longer be accepted at the counter in any Judicial Centre, or by any other method.

Downloading a grant

After a Justice approves your application AND the testamentary documents have been received for storage, you can download your grant. You can also download a letter explaining the new grant format, which can be supplied to banks and other institutions.

1. If your application included TBD values, you will see a reminder of the number of days since the grant was approved. SDS will email reminders to the preparer, applicant and other interested parties after 90 and 180 days if the inventory has not been amended. After 180 days, SDS will send email reminders to the applicant every 30 days until the inventory is amended.
2. Indicator that your grant has been approved by a Justice.
3. Download the Notice of grant change letter, which explains the digital Grant format.
4. Download the grant.

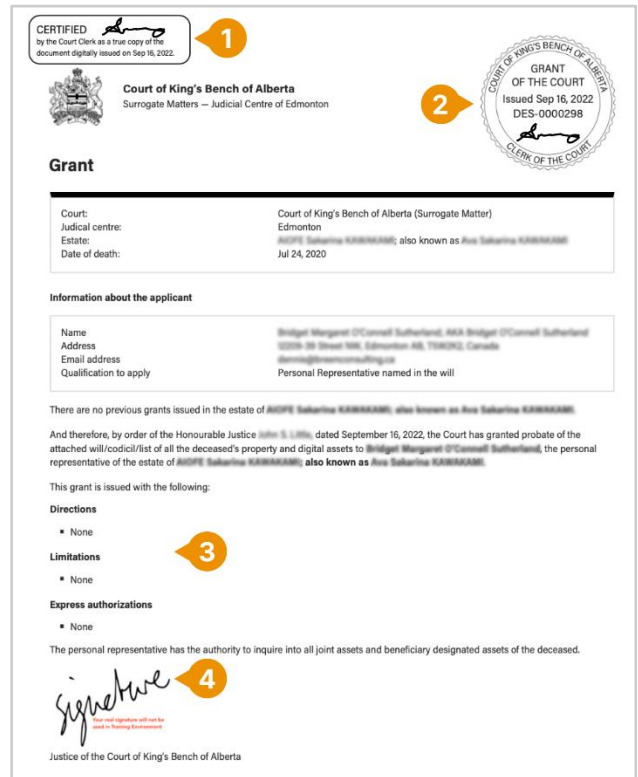


The grant

Digital grants have a different layout from paper grants.

1. **Certified copy stamp.** The date here refers to the date the grant was downloaded – not the date the grant was issued. This is essentially the date the certified copy was issued. It’s possible for you to download multiple copies of the grant, each with their own certification date
2. **Seal:** Includes the Court file number and the issued date, which is the date that the Justice approved the grant application.
3. If the Justice has included any Directions, Limitations or Express Authorizations in the grant, they will be listed near the bottom.
 - a. If your application included any TBD values, the grant will automatically include a Direction to finalize the inventory and serve it to beneficiaries and other interested parties.

Justice’s digitally applied signature.



Amending an inventory with TBD values

Applications containing TBD values must be updated and the finalized inventory must be served to beneficiaries and other interested parties. TBD values can be updated as they become known, but SDS will only serve notices once all TBD values have been updated.

1. If an application includes TBD values, it will appear with a status of “Draft: Amended inventory” on the dashboard.
2. A notice will display the number of days since the grant was issued.
3. Only portions of the application related to inventory, certification, service and payment are editable. Other parts of the application **cannot** be edited after the grant is approved.
4. Navigate to the inventory item that needs to be updated. If it is Land and Minerals, you must update all values - Gross value, Mortgage, and Other encumbrances, even if some of them are zero.
5. You can remove items from the initial inventory or add new ones if necessary.

After all values are updated, go to “Submit and pay” to send the application to the applicant for certification. Once certified, notices will be re-served to beneficiaries and other interested parties. If you had to manually serve notices the first time you will need to do the same with the amended inventory.

SDS will email reminders to the preparer, applicant and other interested parties after 90 and 180 days if the inventory has not been amended. After 180 days, SDS will send email reminders to the applicant every 30 days until the inventory is amended.

Amending an inventory without TBD values

Inventories can be voluntarily amended after the grant has issued.

1. Open the application, click on “More options” in the upper right and select “Amend inventory”
 - a. This will make change the application status to “Draft: Amended inventory” and allow you to make changes to the “Inventory – deceased” and “Inventory – jointly owned assets” sections. **Once you change this status you cannot change it back to “Approved” without resubmitting the application to the Court.**
 - b. You can change inventory values, update inventory details and add or delete assets, as required.

After all values are updated, go to “Submit and pay” to send the application to the applicant for certification. Once certified, notices will be re-served to beneficiaries and other interested parties. If you had to manually serve notices the first time you will need to do the same with the amended inventory.

If the revised value of the estate results in a higher fee, you will be prompted to pay the difference when you send it to the applicant. Previous fee payments are not refundable should the value of the estate be reduced.

Resubmitting an application that has been rejected by a Clerk

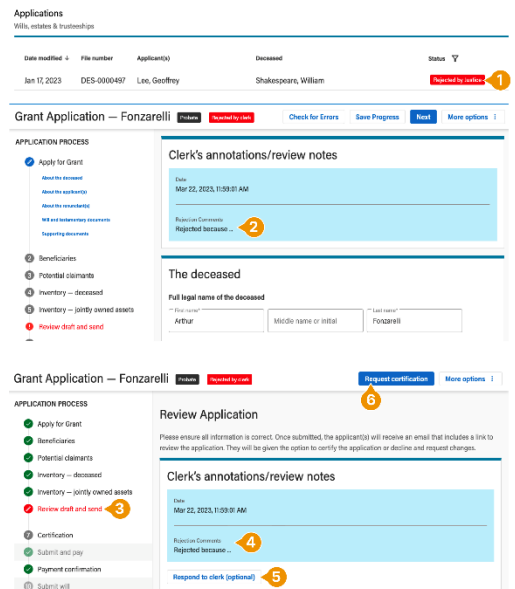
There are a limited number of reasons that a clerk may return an application for revisions.

1. If an application is returned by a clerk it will display on the dashboard with a status of “Rejected by clerk”.
2. When you open the application, the clerk’s notes will display at the top of the screen. Update the application as required.

To Resubmit

3. Click on **Review draft and send** (step 6) in the left navigation. You must go to this step to resubmit the application.
4. You can see the clerk rejection note again.
5. You have the option to include a response to the clerk with your re-submission.
6. Start the resubmission process by clicking “**Request certification**” to get the application certified again.

Once the applicant certifies, the application will be re-submitted for court review. Your previous payment will be honoured. If the estate value is greater than the initial submission, you may be prompted to pay the difference in the application fee.

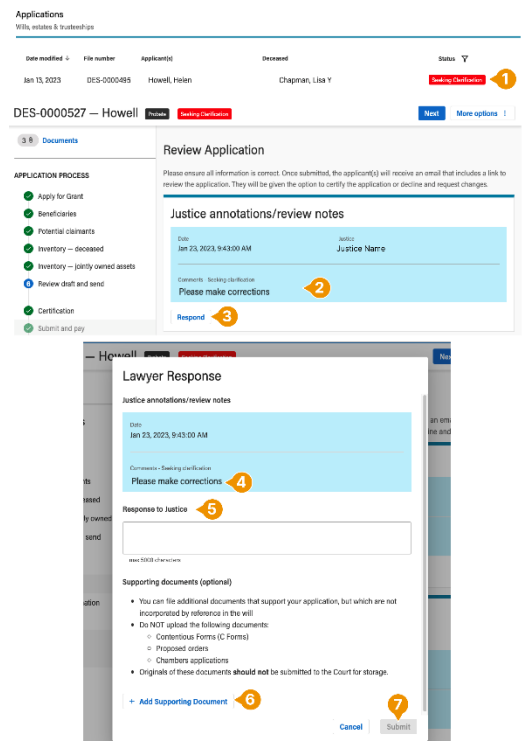


Responding to Justice seeking clarification

When a Justice reviews your application, they may choose to “Seek Clarification”, rather than rejecting or approving it. When a Justice seeks clarification, you must submit a response, but **you cannot alter the application**.

1. The application will display on the dashboard with the status “Seeking Clarification”.
2. When you open the application, the Justice’s note will display at the top of the screen.
3. Click “Respond” to open a window where you can provide an answer to the Justice’s inquiry.
4. The popup displays the Justice’s note.
5. There is an open text field where you must enter a response.
6. If necessary, you can add supporting documents, which will be added to the digital file for the Justice’s review. Unlike testamentary documents, they will not be attached to the Will or Grant.
7. When finished, click “Submit”.

Once submitted, your response will usually be reviewed by the same Justice. When a Justice uses “Seek clarification”, the application does not need to be re-certified or notices re-served upon resubmission.

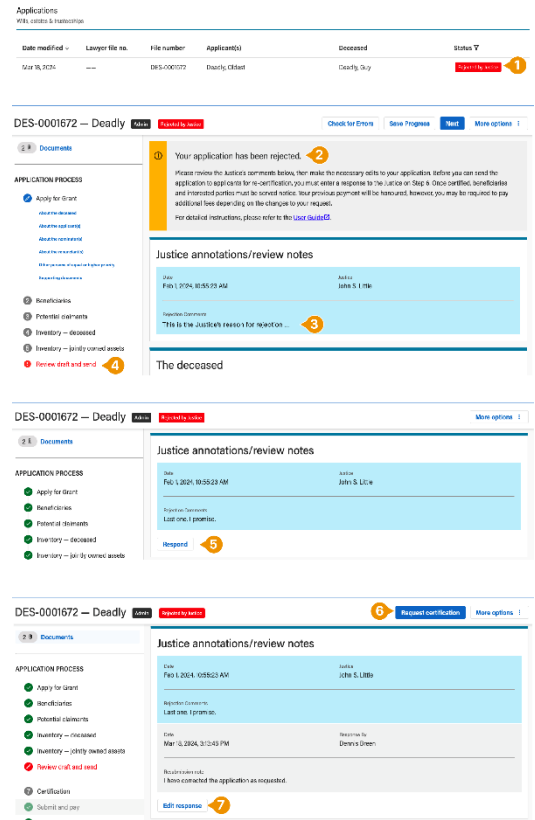


Resubmitting an application that has been rejected by a Justice

If your application is rejected by a Justice, it changes to an editable state so you can make changes. After a rejection, the application must be re-certified by applicants, and notices must be reserved before returning to Justice review.

1. The application displays on your dashboard with the status “Rejected by Justice”.
2. When you open the application, you will see a notice that the application has been rejected by a Justice.
3. The Justice’s rejection reasons display, followed by any annotations that were left by the reviewing clerk.
 - a. You can edit any part of the application, including uploaded documents.
4. After completing your revisions, click on Review draft and send (step 6) in the left navigation. This is the only screen from which you can respond to the Justice and send the application for certification.
5. Click Respond and a window will open. Describe the changes you made to the application. Once you’ve entered a response, the “Request certification” button will appear.
6. Click “Request certification”.
 - a. Your previous payment will be honoured.
 - b. After the applicant certifies, Notices will be generated and sent. You can track and manage notices as with your initial submission.
 - c. Once Notices have been served, the application will go back to the Justice for review. It will not be reviewed by a clerk again.

If necessary, you can edit your response before requesting certification. Once you have sent the application for certification, you can no longer edit your response to the Justice.



Halted applications (due to caveat or conflicting application filed with the Court)

The caveat process takes place outside of SDS, other than the fact that an application in SDS can be halted. Caveats must be submitted on paper as they always have been.

If a clerk discovers a caveat or competing application prior to a Grant being approved by a Justice, they will Halt the application. When they do, the person preparing the application receives an email notification.

When an application is ready to resume, you must contact the surrogate office at the Judicial Centre where the application was made. This must be done outside of SDS.

When they receive the notification to resume the application, the clerk will “unhalt” it so that it can be reviewed. At that point, they will either reject the application so that changes can be made or approve and move it to the next stage of the process (service of notices).

“What to expect” documents

Several documents are available to help law firms understand what their clients will experience when an application is processed in SDS. You can download these for your own reference, or email them to clients as appropriate:

- [What to expect as an Applicant](#)
- [What to expect as a Beneficiary](#)
- [What to expect as a Potential Claimant](#)
- [What to expect as a Renunciant](#)
- [What to expect as a Nominator](#)
- [What to expect as a Consenting Beneficiary](#)
- [What to expect as a Person with Priority \(not renouncing\)](#)

Screening criteria for applications in the digital service

Surrogate Digital Service accepts most probate, administration and administration with will annexed applications. Before submitting, a series of screening and eligibility questions must be answered. These questions are designed to prevent submission of an application that the service cannot handle.

Screening questions determine the grant type, and all eligibility questions for that type must be answered “yes” before creating a new application.

Screening questions

Select from the following options to describe your application. The deceased:

- Left a **valid will**, or one that has been validated by Court order
- Left an **invalid will**, or one that has been invalidated by Court order
- Did not leave a will

Refer to Section 14 of the [Wills and Succession Act](#) to define "will."

Grant of Probate Questions

Eligibility questions

Select all that apply to your situation.

General

- This is not a request for a limited Grant.
- This is not a resubmission for a previously rejected NC/GA application.
- This is not a request for a full Grant, where a limited Grant was previously obtained using an NC/GA application.
- There is no prior Grant issued by a foreign court.
- This application does not include a void gift.

Survivorship: if the will contains a survivorship clause you may start the application, but it cannot be certified or submitted until after the survivorship period has passed.

About the deceased

- The deceased habitually lived in Alberta and/or owned property (as defined in the [Estate Administration Act](#)) in Alberta, including real property and personal property.
- The deceased was at least 18 years old when the will was made.

About the applicant

- The applicant(s) is named as personal representative(s) in the deceased's will, or is named in the will as an alternate if the personal representative named in the will is incapable or unwilling to act.
- The applicant(s) are 18 years of age or over.
- The applicant(s) are not a former spouse or partner of the deceased as defined in the [Wills and Succession Act](#), Section 25 (A provision in a will that appoints a spouse or AIP as executor is void, if after February 1, 2012 and after the will is executed, the marriage is terminated or the adult interdependent relationship ends).
- The applicant(s) have an active, current email address.

Grant of Administration Questions

Eligibility questions

Select all that apply to your situation.

About the applicant and nominator (where applicable)

- The applicant(s) and nominator(s) are 18 years of age or over.
- The applicant(s) have an active, current email address.

About the deceased

- The deceased habitually lived in Alberta and/or owned property (as defined in the [Estate Administration Act](#)) in Alberta, including real property and personal property.
- The deceased was at least 18 years old when they died.

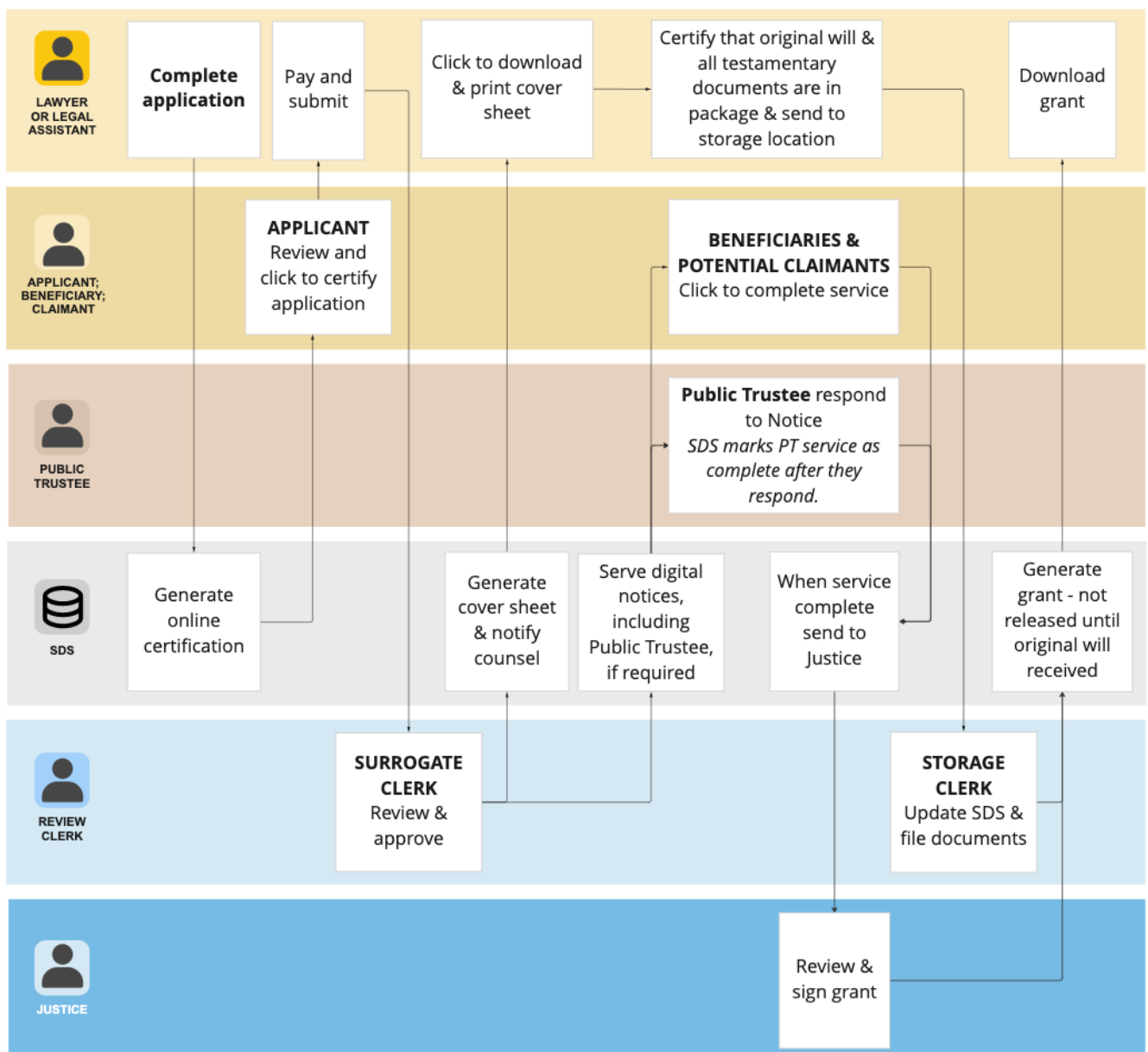
General

- This is not a request for a limited Grant.
- This is not a resubmission for a previously rejected NC/GA application
- This is not a request for a full Grant, where a limited Grant was previously obtained using an NC/GA application.
- There is no prior Grant issued by a foreign court.

The Grant application process in Surrogate Digital Service

1. The person prepares the initial application with input from the applicant(s).
2. Once the initial application is complete, the person preparing the application sends a digital version of the entire application, including will (if any) and other documents, to the applicant(s) for review. Applicants can certify the completeness of the submission with one click. There is no need for them to swear a separate affidavit.
3. After the applicant(s) certifies, the preparer pays with a credit card and submits the application to the Court.
4. A clerk will conduct the two-stage review and either return the application for revisions or approve and send it for Justice review.
5. After clerk approval, SDS automatically:
 - a. Generates a file number
 - b. Serves digital notices to beneficiaries, potential claimants and the Public Trustee, if required
 - c. Notifies the preparer that they can print a cover sheet and submit their original documents.
 - d. The clerk doesn't need to do anything to make these things happen. They happen automatically when clerk review is complete.
6. The person preparing the application will print the cover sheet, attach it to the original documents and send it to the storage location. The package must be sent directly to the central storage location in Edmonton.
7. After all notices have been successfully served (and, if served, the Public Trustee has responded), the application will show up on the Judicial Assignment screen.
8. After assignment, the Justice will approve or reject the application.

After Justice approval AND acceptance of the original documents, SDS will automatically notify the person preparing the application, can download a copy of the grant.



Applicant certification statement - Probate or Admin with Will Annexed – ORIGINAL WILL AND TESTAMENTARY DOCUMENTS

When an applicant certifies an application for a Grant of Probate or Grant of Administration with Will Annexed that includes all original testamentary documents, they must agree to the following statement:

You are required to certify the statements below are true before your lawyer can submit your application to the Court. Ensure you have carefully reviewed the information in the application, the documents to be submitted with it and that you agree with the statements below. **Certifying statements in an application to the Court to be true, knowing that they are not, can result in severe consequences, including being held in contempt of Court and/or being found guilty of an offence.**

I, {Applicant name}, the applicant, certify the following statements are true:

1. All information contained in this grant application is true to the best of my knowledge and belief.
2. Submitted with this application is:
 - a. a true copy of the Death Certificate or Funeral Directors Statement of Death for the deceased;
 - b. a true copy of the original will which I believe is the last will made by the deceased. I do not know of any later will; and
 - c. if applicable, a true copy of the original codicil or codicils, and true copies of any other documents that form part of the will.
3. I undertake to file the original will, and if applicable, the original codicil or codicils and originals of any other documents that form part of the will, with the Court.
4. I acknowledge that I am required by law to carry out the core tasks of a personal representative, which include
 - a. identifying the estate assets and liabilities,
 - b. administering and managing the estate,
 - c. satisfying the debts and obligations the estate, and
 - d. distributing and accounting for the administration of the estate.

I further acknowledge the core tasks of a personal representative may include but are not limited to, those activities described in the Schedule to the Estate Administration Act. I have reviewed the current version of the Schedule.

5. I acknowledge that I am required by law to perform my role as personal representative
 - a. honestly and in good faith,
 - b. in accordance with the Deceased's intentions and with the will and codicils, and
 - c. with the care, diligence and skill that a person of ordinary prudence would exercise in comparable circumstances where a fiduciary relationship exists.

I further acknowledge that I may be required by law to exercise a greater degree of skill if because of my profession, occupation or business, I possess or ought to possess a particular degree of skill that is relevant to the performance of my role of personal representative and that is greater than that which a person of ordinary prudence would be expected to exercise in dealing with the property of another person.

6. I undertake to give notice of this grant application to all persons entitled to receive notice according to law.
7. I undertake to serve an inventory of the Deceased's assets and liabilities on all persons entitled to receive one according to law. I undertake to file proof of service of the inventory as required.
8. If the value of any asset or debt listed in the inventory served by me is described as "to be determined", I undertake to serve an amended inventory on all persons entitled to receive one according to law when updated information becomes available. I undertake to file proof of service of the amended inventory as required.
9. I acknowledge that as personal representative, I am required by law to distribute the estate as soon as practicable.
10. I will not distribute any property to a trustee described in Form GA20 until the trustee has signed an Affidavit of Trustee in Form GA20, which I undertake to retain.
11. I undertake to notify all beneficiaries and persons with potential claims against the estate who have been identified in this grant application by providing them with a notice of grant issuing when the grant has issued.
12. I will faithfully administer the Deceased's estate according to law and will give a true accounting of its administration to the persons entitled to it when lawfully required.

I certify all of the above statements are true.

Applicant certification statement - Probate or Admin with Will Annexed – COPY OF ONE OR MORE TESTAMENTARY DOCUMENTS

When an applicant certifies an application for a Grant of Probate or Grant of Administration with Will Annexed that includes a copy of any testamentary documents, they must agree to the following statement:

You are required to certify the statements below are true before your lawyer can submit your application to the Court. Ensure you have carefully reviewed the information in the application, the documents to be submitted with it and that you agree with the statements below. **Certifying statements in an application to the Court to be true, knowing that they are not, can result in severe consequences, including being held in contempt of Court and/or being found guilty of an offence.**

1. I, {**Applicant name**}, the applicant, certify the following statements are true:
2. All information contained in this grant application is true to the best of my knowledge and belief.
 - a. Submitted with this application is:
 - b. a true copy of the Death Certificate or Funeral Directors Statement of Death for the deceased;
 - c. a true copy of the original will which I believe is the last will made by the deceased. I do not know of any later will; and
3. if applicable, a true copy of the original codicil or codicils, and true copies of any other documents that form part of the will.
4. I undertake to file the original will, and if applicable, the original codicil or codicils and originals of any other documents that form part of the will, with the Court.
 - a. I acknowledge that I am required by law to carry out the core tasks of a personal representative, which include
 - b. identifying the estate assets and liabilities,
 - c. administering and managing the estate,
 - d. satisfying the debts and obligations the estate, and
 - e. distributing and accounting for the administration of the estate.

I further acknowledge the core tasks of a personal representative may include but are not limited to, those activities described in the Schedule to the Estate Administration Act. I have reviewed the current version of the Schedule.

5. I acknowledge that I am required by law to perform my role as personal representative
 - a. honestly and in good faith,
 - b. in accordance with the Deceased's intentions and with the will and codicils, and
 - c. with the care, diligence and skill that a person of ordinary prudence would exercise in comparable circumstances where a fiduciary relationship exists.

I further acknowledge that I may be required by law to exercise a greater degree of skill if because of my profession, occupation or business, I possess or ought to possess a particular degree of skill that is relevant to the performance of my role of personal representative and that is greater than that which a person of ordinary prudence would be expected to exercise in dealing with the property of another person.

6. I undertake to give notice of this grant application to all persons entitled to receive notice according to law.
7. I undertake to serve an inventory of the Deceased's assets and liabilities on all persons entitled to receive one according to law. I undertake to file proof of service of the inventory as required.
8. If the value of any asset or debt listed in the inventory served by me is described as "to be determined", I undertake to serve an amended inventory on all persons entitled to receive one according to law when updated information becomes available. I undertake to file proof of service of the amended inventory as required.
9. I acknowledge that as personal representative, I am required by law to distribute the estate as soon as practicable.
10. I will not distribute any property to a trustee described in Form GA20 until the trustee has signed an Affidavit of Trustee in Form GA20, which I undertake to retain.
11. I undertake to notify all beneficiaries and persons with potential claims against the estate who have been identified in this grant application by providing them with a notice of grant issuing when the grant has issued.
12. I will faithfully administer the Deceased's estate according to law and will give a true accounting of its administration to the persons entitled to it when lawfully required.

I certify all of the above statements are true.

Applicant certification statement - Administration

When an applicant certifies an application for a Grant of Administration they must agree to the following statement:

You are required to certify the statements below are true before your lawyer can submit your application to the Court. Ensure you have carefully reviewed the information in the application, the documents to be submitted with it and that you agree with the statements below. **Certifying statements in an application to the Court to be true, knowing that they are not, can result in severe consequences, including being held in contempt of Court and/or being found guilty of an offence.**

I, **[Applicant name]**, the applicant, certify the following statements are true:

1. All information contained in this grant application is true to the best of my knowledge and belief.
2. Submitted with this application is a true copy of the Death Certificate or Funeral Directors Statement of Death for the deceased;
3. I acknowledge that I am required by law to carry out the core tasks of a personal representative, which include
 - a. identifying the estate assets and liabilities,
 - b. administering and managing the estate,
 - c. satisfying the debts and obligations the estate, and
 - d. distributing and accounting for the administration of the estate.

I further acknowledge the core tasks of a personal representative may include but are not limited to, those activities described in the Schedule to the Estate Administration Act. I have reviewed the current version of the Schedule.

4. I acknowledge that I am required by law to perform my role as personal representative
 - a. honestly and in good faith,
 - b. with the care, diligence and skill that a person of ordinary prudence would exercise in comparable circumstances where a fiduciary relationship exists.

I further acknowledge that I may be required by law to exercise a greater degree of skill if because of my profession, occupation or business, I possess or ought to possess a particular degree of skill that is relevant to the performance of my role of personal representative and that is greater than that which a person of ordinary prudence would be expected to exercise in dealing with the property of another person.

5. I undertake to give notice of this grant application to all persons entitled to receive notice according to law.
6. I undertake to serve an inventory of the Deceased's assets and liabilities on all persons entitled to receive one according to law. I undertake to file proof of service of the inventory as required.
7. If the value of any asset or debt listed in the inventory served by me is described as "to be determined", I undertake to serve an amended inventory on all persons entitled to receive one according to law when updated information becomes available. I undertake to file proof of service of the amended inventory as required.
8. I acknowledge that as personal representative, I am required by law to distribute the estate as soon as practicable.
9. I undertake to notify all beneficiaries and persons with potential claims against the estate who have been identified in this grant application by providing them with a notice of grant issuing when the grant has issued.
10. I will faithfully administer the Deceased's estate according to law and will give a true accounting of its administration to the persons entitled to it when lawfully required.

I certify all of the above statements are true.

Renunciant certification statement

When a PR renounces, they must agree to the following statement:

You are required to certify the statements below are true before the applicant's lawyer can submit the application to the Court. Ensure you have carefully reviewed the information in the application, the documents to be submitted with it and that you agree with the statements below. **Certifying statements in an application to the Court to be true, knowing that they are not can result in severe consequences, including being held in contempt of court and/or being found guilty of an offence.**

I, {Renunciant name}, certify the following statements are true. Where the information is based on advice or information and belief, this is stated.

1. I am a person that may apply to the Court of King's Bench of Alberta for a grant under section 13(1) of the Estate Administration Act to administer the estate.
2. I do not wish to serve as the Deceased's personal representative.
3. I renounce my entitlement to apply for a grant.
4. I have not intermeddled in the Deceased's estate.

I certify all of the above statements are true.

Nomination certification statement

When a PR nominates an applicant, they must agree to the following statement:

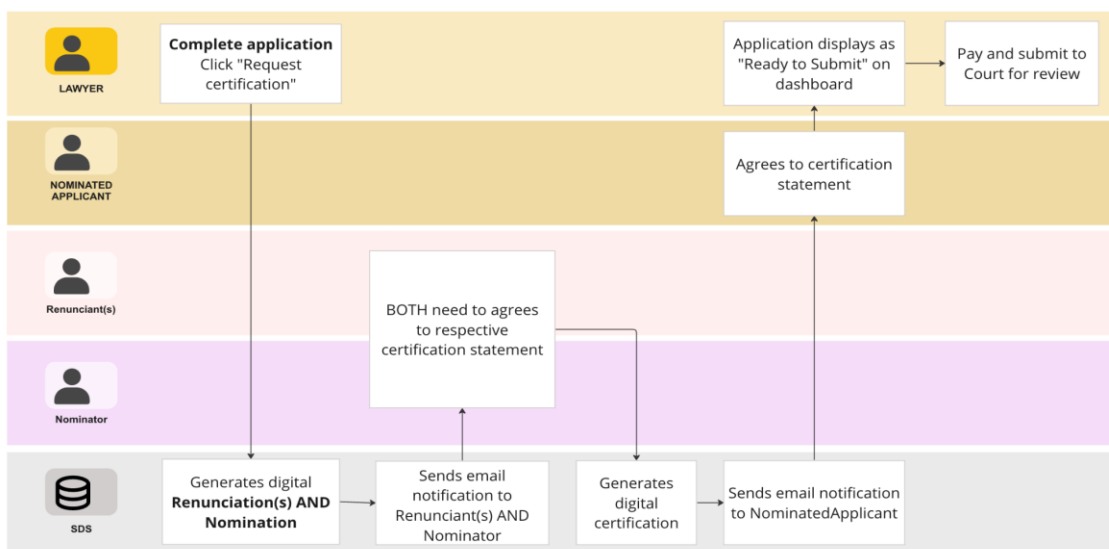
You are required to certify the statements below are true before the applicant's lawyer can submit the application to the Court. Ensure you have carefully reviewed and agree with the statements below. **Certifying statements in a Court application when you know they are not true can result in severe consequences, including being held in contempt of court and/or being found guilty of an offence.**

I, {Nominator name}, certify the following statements are true. Where the information is based on advice or information and belief, this is stated.

1. I am a person that may nominate a person to administer the estate of {Estate name} under section 13(4) of the Estate Administration Act.

I nominate {Nominee name(s)} to apply for a grant

Digital renunciation or nomination process



Certification statement for will and testamentary documents

When the preparer submits a will and other testamentary documents to the Court for storage, they must sign the following statement with a wet signature on a cover sheet generated by Surrogate Digital Service:

I certify that the attached documents, which are also described below, are all the documents required to be provided to the Court in the Grant application described above and that true digital scans of these documents were uploaded to the Surrogate Digital Service and filed digitally with the Court on {Date of application submission}

Originals of documents submitted with digital application (EXCEPT proof of death)

- The Will and each testamentary document included in the application will be listed.
- For each document, there will be an indication of whether it is an original or a true copy.