

# What to expect as an Applicant

When your lawyer applies for your grant via Surrogate Digital Service, your role as an Applicant includes interactions by email, including:

- Certification of the application
- Notice of grant issuing

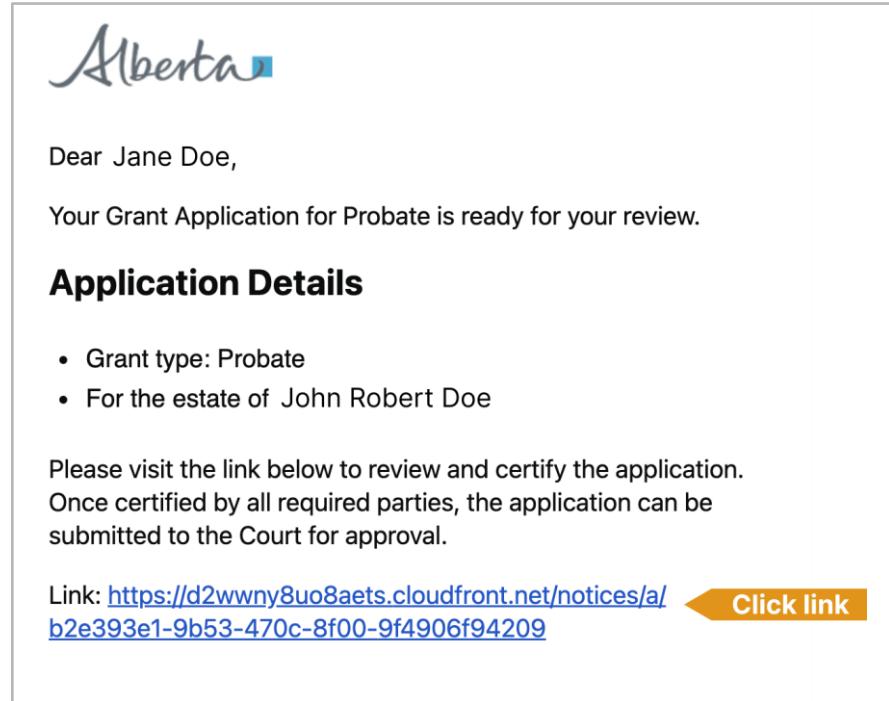
If you are also a beneficiary or potential claimant, you will receive additional email notices.

## Certification email

Before your application can be submitted to the Court for review, you must review it and certify that the content is correct. When your lawyer completes the application, you will receive an email from the digital service. In the email is a link. Click on the link to see the full application, including the will, proof of death and any other attached documents. You must review the application to ensure the information in it is accurate and complete.

***The link in this email is only valid for 72 hours (3 days), so be sure to respond promptly.***

- If the notice expires, the lawyer can resend it.
- Sometimes these emails are tagged as spam by your email program. If you can't find the notice, try searching your email for "Surrogate Digital Service".



The image shows an email template from Alberta Surrogate Digital Service. The header features the Alberta logo. The body of the email starts with a greeting, followed by a statement about the application being ready for review. Below this, a section titled "Application Details" lists the grant type and the estate name. A note about visiting a link to review and certify the application follows, along with a blue link and a call-to-action button. The footer contains the Surrogate Digital Service logo and copyright information.

Alberta

Dear Jane Doe,

Your Grant Application for Probate is ready for your review.

**Application Details**

- Grant type: Probate
- For the estate of John Robert Doe

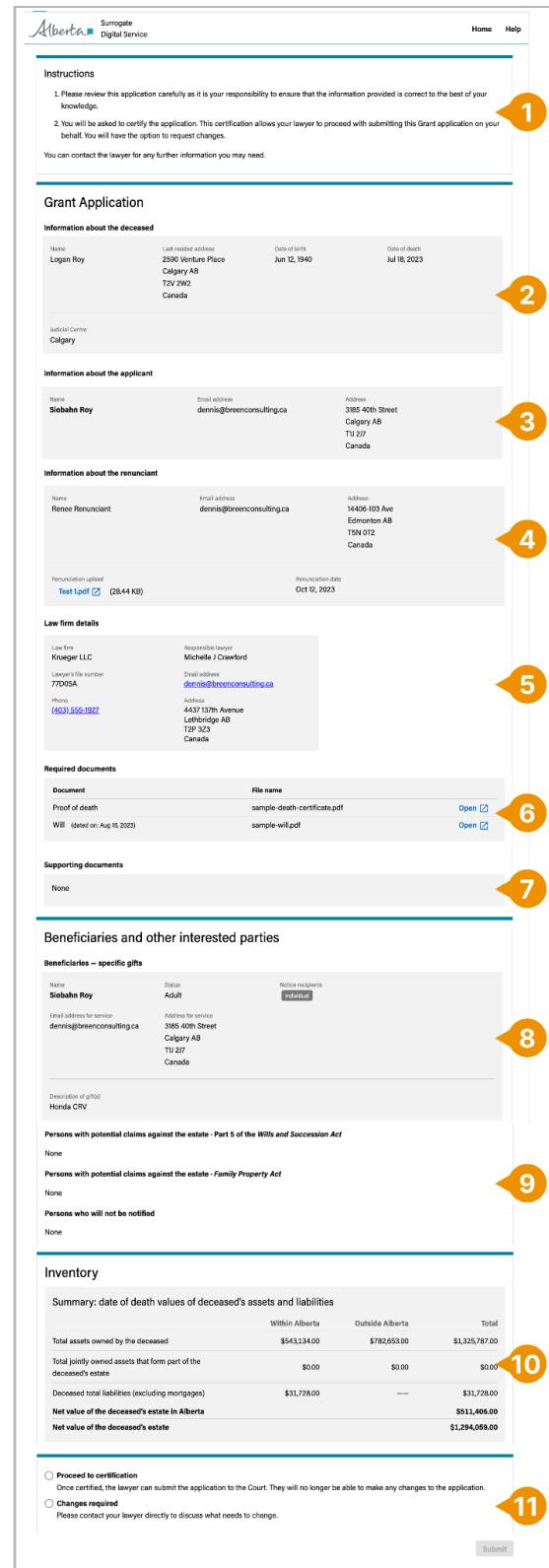
Please visit the link below to review and certify the application. Once certified by all required parties, the application can be submitted to the Court for approval.

Link: <https://d2wwny8uo8aets.cloudfront.net/notices/a/b2e393e1-9b53-470c-8f00-9f4906f94209> 

## The basic application

When you review the application, you will see:

1. Instructions.
2. Information about the deceased.
3. Information about you, the applicant. If there are multiple applicants, all will be listed here.
4. Information about people who are renouncing their right to apply, (if any).
5. Information about the law firm.
6. Links to the proof of death, will, and any other required documents. Documents are PDFs which you can view or download. Your application may or may not include a will.
7. Links to supporting documents, if any.
8. Information about each beneficiary and the gift(s) they are to receive (only one shown in the example).
9. A list of “potential claimants” (if any) who will receive notice of the application.
10. The inventory of the deceased’s assets (only the summary is shown. Following the summary you will see the full details of the inventory).
11. Your decision point - Certifying.
  - a. If the application is correct, you can select “Proceed to certification”
  - b. If you believe changes are required, select “Changes required”, then “Submit”. This will return the application to your lawyer. After you discuss the required changes with your lawyer, and they update the application, you will be asked to certify the application again.



The screenshot shows the Alberta Surrogate Digital Service application interface. The application is divided into several sections with numbered callouts (1-11) pointing to specific fields or sections:

- Instructions:** Step 1. Please review this application carefully as it is your responsibility to ensure that the information provided is correct to the best of your knowledge.
- Grant Application:** Step 2. Information about the deceased. Step 3. Information about the applicant. Step 4. Information about the renunciant.
- Law firm details:** Step 5. Details of the law firm (Knauer LLC) and its representative (Michelle J. Crawford).
- Required documents:** Step 6. Links to the proof of death (sample-death-certificate.pdf) and will (sample-will.pdf).
- Supporting documents:** Step 7. None.
- Beneficiaries and other interested parties:** Step 8. Details of the beneficiary (Siobahn Roy). Step 9. Persons with potential claims against the estate.
- Inventory:** Step 10. Summary of deceased's assets and liabilities. Step 11. Decision point: Proceed to certification or Changes required.

## Special circumstances – Priority to apply

When the deceased did not leave instructions about who should act as executor for their estate, or their instructions can't be followed, you will see an additional section called "Priority to apply". This will display when:

- the deceased doesn't have a valid will;
- the will doesn't name a personal representative (executor); or
- the personal representative named in the will is unable to act as the applicant.

In these situations, legislation defines who has priority to apply for a grant. Consult your lawyer for more details.

1. Instructions.
2. Information about Priority to Apply. Anyone with priority to apply that is equal to or higher than the applicant must be listed. Your lawyer will guide you in filling out this information. Your role is to verify that all relevant people are listed here. If any of the relationship categories display as "None" and you are aware of a person who fits that description, contact your lawyer to revise the application.
3. Your first decision point.
  - a. If the priority card is correct, you can select "Proceed to rest of application" The remaining application will be shown. See the next page.
  - b. If the priority card is incorrect, you should select "No", then "Submit". This will return the application to your lawyer. Discuss the required changes with your lawyer so they update the application. After that's done, you will be asked to certify the application again.

Instructions

1. Please review this application carefully as it is your responsibility to ensure that the information provided is correct to the best of your knowledge.

2. You will be asked to certify the application. This certification allows your lawyer to proceed with submitting this Grant application on your behalf. You will have the option to request changes.

You can contact the lawyer for any further information you may need.

Priority to apply

Priority is to be given to an applicant for a grant, if no will exists, in accordance to Section 13(1)(b) of the [Estate Administration Act](#).

**Applicant**

Priority to apply	Name	Person type	Status
3. Grandchild of the deceased	James Beam	Adult	Has priority

**People with greater priority to apply**

Priority to apply	Name	Person type	Status
1. Spouse of the deceased	Janice Daniels	Deceased	Not acting
2. Child of the deceased and of the spouse or AIP	Jane Beam	Adult	Renounced
3. Child of the deceased but not of the spouse or AIP	None	None	None

**People with equal priority to apply**

None

No other persons exist who have equal or higher priority

Priority to apply

The list above must include any relations to the deceased who have equal or greater priority to apply than the applicant(s). This should include people who are:

- Deceased
- Unable to act or renounce (explanation required)
- Unwilling to act or renounce (explanation required)

Is the information about the family and relationships with the deceased correct?

Yes

No

## Keeping a copy for your records

After you certify, you can download a PDF copy of the certified application. If there are multiple applicants, each of you must certify before the certified application can be downloaded. If you certify before the other applicants, you will receive an email to let you know when the certified application is available for download.

The certified application is returned to your lawyer, who then pays the required filing fees and submits the application to the Court for review. Next steps:

- **Clerk review:** A Court clerk will review the application to ensure it meets basic requirements. If the clerk discovers a problem, they could reject the application. In that case, your lawyer will make the needed adjustments and you will have to re-certify the application.
- **Service of notices:** After the clerk accepts the application, notices will be served to all beneficiaries and potential claimants. If your application includes minor beneficiaries, the Public Trustee must be served notice. This may add some time to the overall process.
- **Justice review:** After service is complete, your application will be assigned to a Justice for review. As with the clerk review, a Justice could reject the application if they discover problems. This would again require corrections and re-certification.

## When the grant is approved

When a Justice approves your grant, you will receive an email that is a “Notice of grant issuing”. **This is not the grant itself.** For security reasons, **only your lawyer can download the grant**, so they will supply you with the final document.

If your application includes a Will, your lawyer will not be able to download the grant until the Court receives the original will for storage.

## If your application contains “to-be-determined” (TBD) values

An application can be submitted and a grant approved before you know all of the final values of the estate's assets. As the applicant, you are responsible to inform your lawyer when the final values are known so your lawyer can update the inventory values on your behalf. This is a legal undertaking you agree to when you certify the application.

You will receive email reminders about the requirement to update the inventory. These are sent 90 days and 180 days after the grant is approved. Emails are also sent to your lawyer, beneficiaries and potential claimants. At 210 days you alone will receive email reminders every 30 days until an amended inventory is submitted. The Court recognizes that updating TBD values may take time. However, if TBD values aren't updated after an extended period, the Court may contact you for an explanation.