

## But for the Plan

### Lost Will Validated: \$300,000 Charitable Gift Saved

George (not his real name), lived frugally in an apartment. He was never married, had no children, and all his siblings and parents pre-deceased him.

The only remaining beneficiary in George's Will was Brentwood Recovery Home, which was established in 1964 when a government task force determined that places like Windsor, where there was a high incidence of drinking-related crimes, should have a recovery home.

But no one could find George's original Will !

If our office copy could not be validated there would be an intestacy, and remote relatives not named in the will would be rewarded instead of Brentwood Recovery Home, which would lose out on a very valuable gift, in excess of \$300,000.

To prevent the intestacy, the Estate Trustee, a friend of the deceased, retained us to initiate a court application to validate our office copy, as if it was the original Will. This case had its difficulties, because we had to reach out to all of the children of George's deceased siblings who would benefit from an intestacy.

After preparing the necessary application and affidavits to validate our office copy of the will, we gradually located all of the aforementioned relatives, spread out across the country. We then successfully served the application and affidavits on 18 of George's 19 nieces and nephews and obtained a court order to validate service on a nephew who was difficult to find.

None of the relatives objected to the application. Our office copy of the will was validated by the court, and Brentwood received its gift.

Following our successful application, the Estate Trustee attended a special appreciation ceremony at Brentwood. Everyone was very thankful for our efforts in this case.