

Step by Step Guide on Process Server logistics

[Back to Agenda Page](#)



STEP 1: ASSEMBLE YOUR DOCUMENTS IN ORDER OF YOUR AFFIDAVIT OF SERVICE & CUSTOMIZE YOUR AFFIDAVIT OF SERVICE FROM THE TEMPLATE PROVIDED

[Back to Agenda Page](#)

You are preparing an affidavit for the process server:

1. So it's easy for them to follow
2. So you are organized
3. So it's way less work and confusion for them and you get the job done the way you want it done

Documents

CLAIM OF LIFE: PG598-408123CA-001a-c

REGISTERED CLIENT / ABN/ EIN (LAST, FIRST MIDDLE): PG598-408123CA-002

TRUST INDENTURE: PG598-408-123CA-003

REGISTERED CLIENT / ABN/ EIN (FIRST MIDDLE LAST): PG598-408123CA-004

INDEMNITY BOND: PG598-408-123CA-005

POA (FIRST MIDDLE LAST): PG598-408-123 CA-006

GLOSSARY OF TERMS FIRST MIDDLE LAST): PG598-408-123 CA-007

SECURITY AGREEMENT (FIRST MIDDLE LAST): - PG598-408-123CA-008

SCHEDULE A (FIRST MIDDLE LAST): - PG598-408-123CA-009

SCHEDULE B (FIRST MIDDLE LAST): - PG598-408-123CA-010

CONSTITUTION (FIRST MIDDLE LAST): PG598-408-123 CA-011

BYLAWS (FIRST MIDDLE LAST): - PG598-408-123 CA-012

MINUTES OF THE MEETING (FIRST MIDDLE LAST): - PG598-408-123CA-013

NOTICE TO CLIENTS (FIRST MIDDLE LAST): - PG598-408-123CA-014

MEMBER WAIVER FORM (FIRST MIDDLE LAST): - PG598-408-123CA-015

NOTICE TO FOREIGN AGENTS (FIRST MIDDLE LAST): - PG598-408-123CA-016

UCC FINANCING STATEMENT (FIRST MIDDLE LAST): - PG598-408-123CA-017

ONCE SILVER DOLLAR: - PG598-408-123CA-018

Prepaid MAIL BAG RECIEPT if you have one: - PG598-408-123CA-019

CUSTOMIZE YOUR PROCESS SERVER AFFIDAVIT

AFFIDAVIT OF SERVICE

I, **JOHN DOE**, process server, of 622 Front St Unit 83, in the City of Nelson, in the Province of British Columbia; **MAKE OATH AND SAY AS FOLLOWS:**

1. On Friday, the 10th of November, 2022, at :00 p.m., I served **JANE DOE(Administrator)** with the following documents that have not been filed in this proceeding:

(a) **BILL OF THE LADING FOR THIS LIFE-BIRTH-CLAIM: PG223-408-123CA-001**, a copy of which is attached to this Affidavit and marked as Exhibit "A";

(b) **REGISTER CLIENT (DOE, JANE SARA): PG223-408-123CA-002**, a copy of which is attached to this Affidavit and marked as Exhibit "B";

(c) **TRUST INDENTURE (Doe Estate Trust): PG223-408-123CA-003 thru PG598-408-974CA-999**, a copy of which is attached to this Affidavit and marked as Exhibit "C";

(d) **REGISTER CLIENT (JANE SARA DOE): PG223-408-123CA-004**, a copy of which is attached to this Affidavit and marked as Exhibit "D";

(e) **INDEMNITY BOND (JANE SARA DOE): Security Agreement – PG223-408-123CA-005**, a copy of which is attached to this Affidavit and marked as Exhibit "E";

(f) **POWER-OF-ATTORNEY (JANE SARA DOE): PG223-408-123CA-006**, a copy of which is attached to this Affidavit and marked as Exhibit "F";

(g) **GLOSSARY (JANE SARA DOE): Security Agreement – PG223-408-123CA-007**, a copy of which is attached to this Affidavit and marked as Exhibit "G";

(h) **SECURITY AGREEMENT (JANE SARA DOE): PG223-408-123CA-008**, a copy of which is attached to this Affidavit and marked as Exhibit "H";

(t) **CANADA-POST MAIL-SCHEDULE, TRACKING-NUMBER: PG223-408-123CA-20**, a copy of which is attached to this Affidavit and marked as Exhibit "T";

(u) **CANADA-POST SIGNATURE-CONFIRMATION, TRACKING-NUMBER: PG223-408-123CA-21**, a copy of which is attached to this Affidavit and marked as Exhibit "U".

2. I served each document referred to in section 1 of this Affidavit to **JANE SARA DOE (Administrator)** by Registered mail 4656 Sheridan Road, County of Kaslo, at the British Columbia, (Non Resident).

SWORN BEFORE ME: at the City)
of Nelson, in the Province of)
British Columbia, this)
____ day of November, A.D., 2022)

SCOTT MACKIE

A COMMISSIONER FOR TAKING
AFFIDAVITS FOR BRITISH COLUMBIA

STEP 2: MAKE TWO SETS OF YOUR DOCUMENTS

Documents

- CLAIM OF LIFE: PG598-408123CA-001a-c
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- TRUST INDENTURE: PG598-408-123CA-003
- REGISTERED CLIENT / ABN/ EIN (FIRST MIDDLE LAST): PG598-408123CA-004
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- UCC FINANCING STATEMENT (FIRST MIDDLE LAST): - PG598-408-123CA-017
- ONCE SILVER DOLLAR: - PG598-408-123CA-018
- Zero dollar MAIL BAG RECIEPT: - PG598-408-123CA-019

EITHER MAKE TWO ORIGINALS OF THE CLAIM OF LIFE AS YOU GO OR COLOR PHOTOCOPY IT. YOU DECIDE. BEST IS WET INK ENDORSEMENTS ON BOTH COPIES. EACH COPY NEEDS ITS OWN ORIGINAL STAMP.

Make two copies. Either print a second copy of all or photocopy. I photocopied my documents and color photocopied any with color on pages and black and white printed the rest.

*Photocopy your silver dollar. One for the original document set and one for the mail bag.

When Process Server goes to post with prepaid mail bag, post office will give a Zero Receipt. Have him keep that and photocopy it and include in Affidavit as an exhibit.

STEP 3: ENDORSE ALL DOCUMENTS

As your mailbag is prepaid, the process server will get a zero receipt when they go to mail the bag at the post. Have them include that as a photocopy in the exhibits as stated in exhibits and get them to include that photocopy for commissioner stamp.



1st Set of Documents

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- NOTICE TO FOREIGN AGENTS (FIRST MIDDLE LAST): - PG598-408-123CA-016
- UCC FINANCING STATEMENT (FIRST MIDDLE LAST): - PG598-408-123CA-017
- ONCE SILVER DOLLAR: - PG598-408-123CA-018 (this will be a photocopy)
- Zero MAIL BAG RECIEPT: - PG598-408-123CA-019 (this will be a copy)

2nd Set of Documents put in Mail Bag but do not close mail bag

- CLAIM OF LIFE: PG598-408123CA-001a-c
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STEP 4:

[Back to Agenda Page](#)

**CUSTOMIZE YOUR INSTRUCTIONS TO YOUR
PROCESS SERVER USING THE TEMPLATE
PROVIDED AS A GUIDE**

CUSTOMIZE YOUR PROCESS SERVER INSTRUCTIONS

Instructions:

- A. Receive documents from I
- B. Read documents to ensure both copies are the same so you can endorse the affidavit attesting to these doc being mailed from one Trust business to the other Unincorporated Association
- C. There is a word version of the affidavit enclosed so you can date it for the date you receive proof from Christine that the mail bag has been delivered (she will email you the pdf download of the tracking delivery pdf). Please print and stamp as an exhibit as per below Exhibits.
- D. Please exhibit stamp and sign all documents and get the affidavit notorized at our notary/lawyer
- E. Call Christine she will come pick up signed affidavit and all stamped documents

In package and duplicate copy (one for mail bag and one for you to hang on to until returned to Christine with notarized, signed affidavit.

Exhibit A

CLAIM-OF-THE-LIFE – PG640-562-093CA-001

Exhibit B

CANADIAN REGISTERED CLIENT: - PG640-562-093CA-002 with BUSINESS
REGISTRATION No.: 71329 6309
REGISTRATION Name.: Lee Estate Trust
Activity: Charitable Organization

Exhibit C

TRUST INDENTURE - PG640-562-093CA-003

Exhibit D

REGISTER CLIENT: - PG640-562-093CA-004 with BUSINESS REGISTRATION No.: 1208
7006
REGISTRATION Name.: Lee Association
Activity: Trust Management

Exhibit E

INDEMNITY BOND - PG640-562-093CA-005

Exhibit F

POWER OF ATTORNEY - PG640-562-093CA-006

Exhibit G

GLOSSARY - PG640-562-093CA-007

Exhibit H

SECURITY AGREEMENT - PG640-562-093CA-008

Exhibit I

SECURITY AGREEMENT - SCHEDULE A- PG640-562-093CA-009

Exhibit J

10. SECURITY AGREEMENT - SCHEDULE B - PG640-562-093CA-010

Exhibit K

STEP 5: Meet with your Process Server

Meet your process server and give them two packages and the affidavit and instructions. Go over instructions with them. You will email them a version of the affidavit also so they can change the date to the date of signing, their address etc.

- The Process Server will now review both sets of documents to confirm that:
 - Both sets of documents are the same
 - They will ready through the instructions
 - They will adjust the .doc version of the affidavit witht their name, date, address and print to take to the notary with them.
 - **They will mail your mail bag** with one set of docs(witnessing one business serving documents to the other business)

- ******If your mailbag is prepaid - they will need to receive a zero dollar receipt and photocopy it and put it with all other docs they are taking to the commissioner for notarization/stamp.**



STEP 6: PRINT OUT YOUR ADDITIONAL DOCUMENTS AFTER MAILING

You will have two additional documents as part of your entire package that you need to get to your Process Server

Once the process server has put the mail package in the mail, you will track the package using your local post tracking services: ie. Canada Post tracker on search engine. Australia post tracking. USPS tracking.



MAIL BAG POST TRACKING SCHEDULE: - PG598-408-123CA-020

Once it shows delivered. Save a copy of that delivery schedule shown on line to your files. Email a copy to your process server as it will be in their affidavit so they need a copy.

Once your package arrives and you sign for it as "grantee". Get a copy of that signature confirmation either by taking a picture or download a copy of it online or save a copy of the tear sheet given to you upon pickup. Email a copy to your process server as it will be in their affidavit so they need a copy.



POST DELIVERY ENDORSEMENT CONFIRMATION: - PG598-408-123CA-021

STEP 7:

**NOW PROCESS SERVER
INCLUDES LAST TWO DOCS.
THEY WILL PUT EXHIBIT STAMPS
ON IN THE ORDER THEY ARE IN
AS PER AFFIDAVIT YOU
PROVIDED.**

**THEY CAN NOW GO TO THE
NOTARY.**

Set of Documents FOR NOTARY

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ONCE SILVER DOLLAR: - PG598-408-123CA-018

Zero MAIL BAG RECIEPT: - PG598-408-123CA-019

POST TRACKING SCHEDULE: - PG598-408-123CA-020

CANADA POST DELIVERY ENDORSED CONFIRMATION: - PG598-408-123CA-021

STEP 7:

The Process Server will stamp Exhibit A-U on all your documents in the package they still have and will go to Notary to get notarized.

They will sign the affidavit at notary and now all your documents will have an exhibit stamp on first page (if document ie. trust indenture is 13 pages, only first page of all doc sets get stamped as exhibit).

Now the process server has a full set of documents with an affidavit, witnessed by notary ready for you to pick up.



STEP 8:

Go pick up your second set of docs that are all now Exhibit stamped and notarized and you have a signed affidavit witnessing the Trust conveying documents to the UA/Trustee.

You are now ready to make an appointment with the Bank!

WAHOO!