

# Step by Step Guide on Process Server logistics

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

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## 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 10<sup>th</sup> 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
- 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
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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

- 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
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- 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
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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
- 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): PG598-408123CA-007
- SECURITY AGREEMENT (FIRST MIDDLE LAST): - PG598-408-123CA-008
- SCHEDULE A (FIRST MIDDLE LAST): - PG598-408-123CA-009
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- UCC FINANCING STATEMENT (FIRST MIDDLE LAST): - PG598-408-123CA-017
- ONCE SILVER DOLLAR: - PG598-408-123CA-018
- Prepaid MAIL BAG RECIEPT: - PG598-408-123CA-019

## STEP 4:

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

# CUSTOMIZE YOUR PROCESS SERVER INSTRUCTIONS

## Process Server Instructions

1. Receive 2 mirrored document sets from Chad John Fitz Association, along with a prepaid, signature required (US, AUS, Canada Post pre-paid mail bag) mailer from Chad.
2. Check that both copies are the same so you can endorse an affidavit attesting to one set of these documents being mailed from one business (the Trust) to the other business (the Unincorporated Association).
3. Take the 1st set of documents, enclosed (but not sealed) in the mail-bag to the post office. Ask the postal employee for a "zero (no money owing) receipt". Take a picture of the "zero receipt" before adding this receipt to the mail-bag mailer. Seal the mailer and hand it to the (US, AUS, Canada) Post employee for delivery.
4. Email the picture of "Zero Receipt" to Chad.
5. Once delivered, Chad will email you three .pdf documents and one word document:
  1. a pdf copy of the "zero receipt" (Exhibit S)
  2. a pdf copy of mail tracking and delivery schedule (Exhibit T)
  3. a pdf download of the signature confirmation (Exhibit U)
  4. word doc of the example affidavit or service for you to customize and date (the date the mailbag was sent as found on the "zero receipt").
6. Please print off these 4 documents (Exhibits S, T, U & Affidavit) and add them to the 2nd set of documents still in your possession.
7. Apply your Exhibit stamp and signature to the 1st pages of all Exhibits (if you do this or if commissioner does this then go to next step).
8. Go to commissioner, have them notarize your exhibit stamps (or apply and notarize their exhibit stamps including your signature), along with the affidavit of service.
9. Call me and I will come pick up signed affidavit and all stamped documents.

## In package and duplicate copy binder:

### Exhibit A

CLAIM-OF-THE-LIFE – PG123456789CA-001

### Exhibit B

REGISTER CLIENT(S): - PG123456789CA-002

BUSINESS REGISTRATION No.: 74295 1213

REGISTRATION Name.: Fitz Estate

Activity: Benevolent Services Organization

### Exhibit C

TRUST INDENTURE – PG123456789CA-003

### Exhibit D

REGISTER CLIENT: - PG123456789CA-004

BUSINESS REGISTRATION No.: 74295 6212

REGISTRATION Name.: Fitz Association

Activity: Trust Management

### Exhibit E

INDEMNITY BOND – PG123456789CA-005

### Exhibit F

POWER OF ATTORNEY – PG123456789CA-006

### Exhibit G

GLOSSARY – PG123456789CA-007

### Exhibit H

SECURITY AGREEMENT – PG123456789CA-008

### Exhibit I

SECURITY AGREEMENT - SCHEDULE A - PG123456789CA-009

### Exhibit J

SECURITY AGREEMENT - SCHEDULE B – PG123456789CA-010

### Exhibit K

CONSTITUTION – PG123456789CA-011

### Exhibit L

BYLAWS – PG123456789CA-012

### Exhibit M

MINUTES OF THE MEETINGS – PG123456789CA-013

### Exhibit N

NOTICE TO CLIENTS – PG123456789CA-014

### Exhibit O

MEMBER-WAIVER-FORM – PG123456789CA-015

### Exhibit P

NOTICE-TO-FOREIGN-AGENTS – PG123456789CA-016

### Exhibit Q

UCC Financing Statement - PG123456789CA-017

### Exhibit R

One Silver Dollar coin (ounce) in mail bag and photocopy in 2nd document set - PG123456789CA-18

### Exhibit S

Prepaid mail receipt from original Mail-bag mailer purchase and "Zero Dollar receipt" from Post office drop off - PG123456789CA-19

**Only in 2nd set of documents (to Notary), not in mailer**

### Exhibit T

POST MAIL-SCHEDULE, TRACKING-NUMBER – PDF download: PG123456789CA-20

### Exhibit U

POST SIGNATURE-CONFIRMATION – PDF download: PG123456789CA-20

**AFFIDAVIT OF SERVICE (TRUST CONVEYANCE – PG123456789CA-000 thru 999)**

# 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**

**One 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  
COMMISSIONER OF OATHS**

## Set of Documents FOR NOTARY

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**TRUST INDENTURE: PG598-408-123CA-003**

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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 a commissioner to be witnessed and signed

They will sign the affidavit at commissioner of oaths 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 a commissioner ready for you to pick up.



## **STEP 8:**

**Go pick up your second set of docs that are all now Exhibit stamped and witnessed 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!**