



## SERVICES TO ADULTS

### ASSESSMENT AND INVESTIGATION SERVICES

The Public Guardian and Trustee of British Columbia (PGT) promotes and upholds the legal interests and safeguards the financial and personal interests of children and adults and administers the estates of deceased and missing persons.

The PGT is contacted by persons with concerns of possible abuse, neglect or self neglect involving vulnerable adults.

#### Who we are

Assessment and Investigation Services (AIS) responds to all requests for the PGT to act as a substitute decision maker for a vulnerable adult. We may be asked to assist by:

- Exercising PGT protective measures, including temporarily freezing bank accounts or preventing property transfers during the investigation process.
- Pursuing authority for the PGT to act as decision maker of last resort, usually as Committee of Estate.
- Investigating actions of trustees, representatives or attorneys under Powers of Attorney when the adult is incapable and concerns about financial management have been raised.
- Consulting on complex risk situations involving abuse, neglect or self neglect of vulnerable adults.
- Providing information on formal/informal options available to assist.

#### When we investigate

While there are many options or agencies that may assist a vulnerable adult, if there are concerns about the actions of a substitute decision maker or there appears to be a need for one, the PGT may assist. We investigate when:

- There is an immediate risk of harm to the adult's assets;
- There is reason to believe that the adult is not capable of managing his/her financial or legal affairs; and
- No other suitable person (family or friend) has the authority or is willing and able to act on the individual's behalf.

When we investigate, we follow these principles:

- All adults are presumed to be capable until the contrary is demonstrated.
- No one should have a decision maker appointed by the court until other alternatives have been considered.
- Everyone is entitled to the least intrusive but most effective support.

## Ways to assist

There are several options to assist adults who are not able to manage:

- If an adult is capable, he or she can appoint an attorney under the *Power of Attorney Act*;
- He or she may also consider appointing a representative with limited powers under s. 7 of the *Representation Agreement Act* for routine management of financial matters;
- Service Canada can appoint a Pension Trustee for Canadian federal pensions;
- The PGT can be appointed Committee of Estate by certificate issued by the Director of a mental health unit; or
- The Supreme Court of BC can appoint a Committee of Estate or Committee of Person.

Assessment and Investigation Services takes referrals and reviews allegations of financial abuse of vulnerable adults in the community to determine if substitute decision making authority is required.

# Contact the Public Guardian and Trustee

### **Greater Vancouver Regional Office**

700-808 West Hastings Street,  
Vancouver, BC V6C 3L3  
Tel: 604.775.1007  
Fax: 604.660.9498  
email: ClericalRequest6@trustee.bc.ca

### **Lower Mainland Regional Office**

700-808 West Hastings Street,  
Vancouver, BC V6C 3L3  
Tel: 604.775.1001  
Fax: 604.660.9479  
email: ClericalRequest6@trustee.bc.ca

### **Interior-North Regional Office**

1345 St. Paul Street,  
Kelowna, BC V1Y 2E2  
Tel: 250.712.7576  
Fax: 250.712.7578  
email: kpifaa@trustee.bc.ca

### **Vancouver Island Regional Office**

1215 Broad Street  
Victoria, BC V8W2A4  
Tel: 250.356.8160  
Fax: 250.356.7442  
email: Victoria-Clerical@trustee.bc.ca

Website: [www.trustee.bc.ca](http://www.trustee.bc.ca)

email: [mail@trustee.bc.ca](mailto:mail@trustee.bc.ca)

*Toll free calling is available through Service BC. After dialing the appropriate number for your area (below), request to be transferred to the Public Guardian and Trustee (regular office hours 8:30am-4:30pm, Mon-Fri).*

Vancouver: 604.660.2421  
Victoria: 250.387.6121  
Other areas of BC: 800.663.7867