

GREETINGS!

FROM PRIVATE COMMITTEE SERVICES

Welcome to our second issue of *Working Together*. This annual newsletter highlights reviewing your accounts, courses & information sessions, disability tax credits and other issues that could affect your role as a Private Committee. We also cover topics suggested by responses to our previous year's survey. This time we have included an insert that covers issues related to your investment decisions and how we set compensation (often referred to as Private Committee remuneration).

The Private Committee Services Department strives to provide the best service to you and the adult for whom you are committee. The survey responses from last year were very helpful in deciding how to focus our efforts. We hope you will take a few moments to give us more feedback, on the enclosed survey, about how we can better work with you and topics that you would like covered in future issues of *Working Together*.

I want to take this opportunity to thank you for the important and vital work you do. Our job is to help you. Together we serve adults for whom the Supreme Court of British Columbia has appointed a Private Committee.

Sincerely,



Harp Bagri, Manager
Private Committee Services

SPEEDING UP OUR SERVICE!

Reducing the time it takes from when you submit your accounts until we review your accounts is a priority for our department. It's a priority for Private Committees too, judging by your responses to the Survey in the last issue of this newsletter. We have undertaken several initiatives to improve our efficiency in reviewing your accounts:

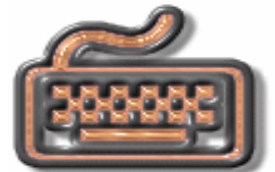


- We are developing new policies and procedures to streamline our review process.
- We have supplemented our regular staff with a backlog reduction team over the past 3 months to expedite our service.
- In 2003, the *Patients' Property Act* was changed to eliminate the requirement to provide accounts to the Public Guardian and Trustee when a person who had a Committee died.

This year, we have once again reduced our average wait time to review your accounts. We are aiming at further improvements next year with these new initiatives.




ELECTRONIC FILING PROCESS

Last year, we mentioned that we are working to develop an electronic program as one of the initiatives to improve efficiencies. As a first step, we are making available on our website at (http://www.trustee.bc.ca/reports_publications/index.html) an Excel spreadsheet similar to the one the Committee Review Officers use in their reviews.



This spreadsheet links the various schedules and provides both a cash and asset reconciliation.

If you use the spreadsheet, there is no need to complete the Accounting Package forms manually. For reporting electronically, please send us the electronic spreadsheet on a disc. You will still need to send us the paper documents supporting your accounting, including:

-  Affidavit of Accounts Passing, duly sworn.
-  Supporting documentation such as bank statements, BC Assessment Notices, etc. as requested in the Accounting Package.
-  A cheque for our review fee.

We encourage Private Committees to use this format as it will help us speed our service to you. We look forward to your feedback on this innovation via our survey.

COURSES AND INFORMATION SESSIONS

Private Committee Services can review accounts in a much more timely way when we receive complete accounts in our format with all the documentation that we need.

Another initiative that we are taking to reduce the time it takes to review your accounts is to develop a course aimed at accountants and financial professionals. The course will provide professional development credit to meet their professional development obligations and will cover reporting issues, including items that we would prefer reported separately (such as gifts). The course will also cover topics about



which accountants often advise their clients, such as investments and estate planning. If you use the services of an accountant or bookkeeper, please give them a copy of this newsletter. For further information, please email us at pcsnewsletter@trustee.bc.ca and we will let you know dates, times and locations.

We are also considering information sessions for Private Committees which will cover a broader range of issues and may help those of you who are preparing your first reporting or set-up. These will also provide an opportunity for Private Committees to meet one another and our staff. If you would be interested in attending an information session, please let us know on the attached survey form and tell us about additional topics you would like covered.

LEGAL ISSUES

CLASS ACTIONS

Class actions are lawsuits for situations where a large number of people have the same type of claim against one or more parties.



In a class action, a representative plaintiff is chosen to represent all individuals with a similar claim (for example, a shareholder in a corporate suit or an individual who became ill as a result of a blood transfusion). The judgment or settlement applies to everyone with that type of claim, unless the person chooses to bring a claim independently of the class action or “opts out” of the class action.

This procedure allows a much larger number of claimants, including those who could not afford the legal fees, to recover some damages.

Several class actions are currently underway that may affect the person for whom you are committee.

Indian Residential School Students

The federal government signed an Agreement in Principle on November 20, 2005 to settle all class actions and individual actions for everyone who attended an Indian residential school, regardless of ethnicity. If you'd like to learn more about this class action, please see the website of legal counsel, Thomson Rogers, at www.thomsonrogers.com/classaction.htm. This law firm also has a Residential Schools Class Action data base to keep claimants informed.

Nortel Networks

On February 8, 2006, a contingent settlement was reached in the class action brought on behalf of shareholders who bought shares in Nortel Networks in the periods between Oct. 24, 2000 and Feb. 15, 2001 and between April 24, 2003 and April 27, 2004.

For further information, please see the website of the law firm representing two of the lead plaintiffs, www.blbglaw.com/cases/nortel_securities.html.

Woodlands

Woodlands was an institution for people with developmental disabilities that closed in 1996. A class action has been certified to advance the claim for former Woodlands residents who suffered abuse. If you would

like further information, you may contact the lawyers bringing the class action, Poyner Baxter at: classaction@poynerbaxter.com.


DISABILITY TAX CREDITS

If the person for whom you are Committee pays income tax, you may reduce the tax payable by claiming various deductions allowed by Canada Revenue Agency for people with disabilities. In order to claim these deductions, you need to apply for a Disability Tax Credit Certificate (Form 2201) on their behalf. A person is considered "disabled" for the purposes of the tax credits if a "medical doctor or a psychologist ...certifies that **all or almost all the time** you were unable, or it took you an extremely long time, to ... **perceive, think, and remember**". Usually the Certificate applies to all future years as well as the current year.



There are several deductions possible for those who qualify for the certificate. These include attendant care, additional medical expenses related to the disability and facility care. You can visit Canada Revenue Agency's Web site at www.cra.gc.ca for information applicable to your situation. You may wish to seek the advice of a qualified tax practitioner to assist you in determining the deductions that can be claimed.

RESPONSE TO THE SURVEY

 Last year, we sent copies of *Working Together* to all Private Committees in British Columbia. We were pleased that 159 of you, mostly family members, responded to the survey. We have included many of your ideas and suggested topics in this newsletter and will continue to do so in future years.

PRIVATE COMMITTEE STATISTICS

Number of Adults with a Private Committee in BC: **2,110**

Number of new Private Committee applications in 2005: **317**

Number of accounts received in 2005: **690**

Accessibility

Ninety-two percent of you responded that accessibility to your Committee Review Officer and the Private Committee Services Department was “Satisfactory” to “Excellent”. We will continue to work to make our services available to you in a timely way by setting higher service standards and improving response time when regular staff are unable to take your call.

Communications



We are working to improve communications with you. We are pleased that over 85% of you thought that the newsletter is a good vehicle for interaction. We will continue to provide this avenue for communication to you.

Please let us know when there are specific issues that you would like discussed.

The majority of respondents thought that the interview and information you received at the beginning of your Committeeship were adequate. However, there were several suggestions that the interview process should be in person and cover the Private Committee Handbook more comprehensively.

One strategy we are considering is group information sessions for Private Committees and we’ve asked for your feedback on this in the survey.

Of those who responded to the survey question on compensation, 78% thought the way that we determine your compensation for your services as Committee was adequate. Some expressed confusion about our calculations, so we have enclosed the schedule of how we set remuneration for Private Committees on the insert.

In the general comments, the two most frequent concerns raised were the length of time required to pass accounts and the cost of the review. As noted above, we are taking steps to reduce our review time. The cost of the review is established by the *Public Guardian and Trustee Fees Regulation*, which is set by the Provincial Cabinet. It partially pays for the cost of the review with the balance paid by the province. No changes to the review fee are anticipated in 2006.

If you have comments or concerns about this newsletter or other issues related to Private Committee Services, please take a moment to complete the enclosed survey form.

WE’RE HERE TO SERVE YOU

While you may deal with a number of PCS staff during your committeeship, your key contact is the Committee Review Officer assigned to work with you. These assignments are made based on the last name of the adult for whom you are committee:

A to Dn	Phil Campeau	(604) 775-0204	pcampeau@trustee.bc.ca
Do to J	Judy Chen	(604) 660-4483	jchen@trustee.bc.ca
K to Ol	Christoper Ting	(604) 660-4424	cting@trustee.bc.ca
Om to Te	Mohan Sidhu	(604) 660-1854	msidhu@trustee.bc.ca
Tf to Z	Doris Wong	(604) 660-4432	dwong@trustee.bc.ca
Manager	Harp Bagri	(604) 660-4481	hbagri@trustee.bc.ca