

Invoicing FAQ

1) I use my own (PDF, Word, Excel) invoice template. Do I have to use the PGTs invoice template?

No. There is no requirement for vendors/suppliers to use the PGT's invoice template. This template outlines for vendors/suppliers the minimum information that the PGT requires to process an invoice. Vendors/suppliers that use the PGT's template with complete information can anticipate improved processing times.

2) What is Direct Deposit?

Direct Deposit is a payment solution that involves directly exchanging funds between two bank accounts. Sometimes it is referred to as electronic funds transfer (EFT), echeque or echequing.

3) Why should I fill out the Direct Deposit Form? Do I have to?

Direct deposits reduce transaction processing costs and improve efficiency, resulting in quicker payments with less processing, filing and trips to the bank to deposit a cheque. In addition, direct deposit is a secure and private method of fund transfer that eliminates the risks of lost, stolen or misdirected cheques. While there is no requirement for signing up for direct deposit, the PGT encourages all vendors/suppliers to sign up.

4) That's great! What Direct Deposit Form do I use?

- a) If you are submitting invoices related to a PGT client, you should fill out the Trust Account Direct Deposit Form.
- b) If you are submitting invoices related to PGT corporate affairs, you should fill out the Corporate Direct Deposit form.

5) I've filled out the form, where do I send it? Where do I send the invoice?

Both forms and invoices can be sent to the Public Guardian and Trustee, 700-808 West Hastings Street, Vancouver, BC, V6C 3L3 or by email (Invoices@trustee.bc.ca) or by fax (604.660.1855). This includes invoices or deposit forms for services arranged through the Victoria or Kelowna offices.

6) How will I know whether an invoice has been paid or not if I don't get my cheque in the mail?

Each time a payment is made via direct deposit, the payee will receive a remittance voucher outlining the payment made and description information for vendor reconciliation.

7) Do I still have to submit originals or copies of supporting information (i.e. receipts, etc...)?

It depends. Please contact your local PGT representative to discuss invoice submission methods and supporting document requirements.