Private committee getting started checklist

This checklist is an overview of the tasks you, as a new committee, may need to do. Each situation is different. Not everything in this checklist will apply to you, but it will point you in the right direction.

It is recommended that you record reasons for any decisions you make on behalf of the adult at the time of making them.

Get familiar with the role of committee

- Read the [Private committee guide] on our website
- Read your court order and ask your lawyer if you have any questions
- Make a note of your committee review officer at the PGT. You will receive an introductory letter from them a few weeks after your court order has been filed. You can contact this person if you need advice

Set up your records

- ☐ Consider contacting a bookkeeper or accountant for assistance if you feel you need help
- ☐ Set up a way to track expenses related to the adult
- ☐ Keep copies of all documents related to your committee application
- ☐ Establish a filing system to keep track of everything related to the adult's income, expenses, assets and liabilities and your committeeship
- ☐ The PGT has an online submission process, so keeping documentation digitally related to any of the following topics will prepare you for when you need to submit your accounts:
  - ☐ Bank statements
  - ☐ Investment and securities statements
  - ☐ Tax returns
  - ☐ Will
  - ☐ Vehicles
  - ☐ Real property/mortgages
  - ☐ Personal effects/jewellery
  - ☐ Business interests
  - ☐ Credit cards, lines of credit, other loans
  - ☐ Determine all sources of income
  - ☐ Gifts, donations

Perform initial estate management activities

- ☐ Set up a budget for the adult
- ☐ Create a plan for how the adult's assets will be managed
- ☐ Notify necessary people and organizations of your appointment, providing a copy of the court order as required
- ☐ Pay debts
- ☐ Ensure all expenses are paid (including medical/insurance premiums)
- ☐ Develop a written investment plan/strategy (see Investment considerations and plans)
- ☐ Ensure real property, if applicable, is maintained and insurance payments are up to date

Identify any legal or tax issues

- ☐ Locate the adult's will and make sure you understand all the instructions related to the adult's assets and wishes
- ☐ Identify if the adult is named in a will or trust
- ☐ Check that income tax filings are up to date; if tax filing is outstanding, file the income tax
- ☐ Other criminal and/or civil proceedings

Make arrangements related to healthcare and residence

- ☐ Contact all of the adult's healthcare professionals regarding scheduled visits
- ☐ Assess and address any safety concerns regarding the adult's living situation
- ☐ Contact any social service agencies that may be providing services to explain you are committee and understand the services the adult was getting
- ☐ Review the adult's care plan if applicable
- ☐ Attend any meetings with the adult's care team

Contact the Public Guardian and Trustee

Private Committee Services

700–808 West Hastings Street
Vancouver, B.C. V6C 3L3

Phone	604-660-1500
Email	PCSadmin@trustee.bc.ca
Website	www.trustee.bc.ca

Toll free calling

Toll free calling is available through Service BC. After dialing the appropriate number for your area (see below) request to be transferred to the Public Guardian and Trustee.

Vancouver	604-660-2421
Victoria	250-387-6121
Other areas in B.C.	1-800-663-7867

PGT hours of operation
Monday to Friday 8:30am to 4:30pm