

Private committee expense report

Included in this expense report

This expense report is only concerned with the Adult's expenses for the reporting period.

You can think of expenses as spending to purchase goods or services for the benefit of the Adult for whom you are committee. Examples include care facility fees, medical expenses, property maintenance and income taxes

The supporting documentation required

If the adult for whom you are committee has real estate in their name, you must provide the property tax assessment with this expense report.

If the adult for whom you are committee has an RDSP over \$50,000, this expense report must include the statement showing the balance as of the review end date.

We will review the expenses and request any documentation necessary to support the expenses included in this report once our review is complete. However, to save time, you may include support (e.g., receipts) for any expenses you think are significant along with this report.

Where do I send this report?

Please send or email this expense report and supporting documents to:

Public Guardian and Trustee

Private Committee Services

700-808 West Hastings Street
Vancouver, BC V6C 3L3

PCAdmin@trustee.bc.ca

Information you provide is for the purpose of reviewing and passing the accounts of a private committee. Information is collected under the Freedom of Information and Protection of Privacy Act (FOIPPA) and other applicable legislation.

If you have any questions about the collection, use or disclosure of information, contact the PGT's Information and Privacy Officer, at 604-660-4444 or mail@trustee.bc.ca

Expense report

The expenses of the Estate of I/We,

Name of adult

as of

were as follows:

End of accounting period

Board and lodging (e.g., care facility fees, room and board)

Description	Amount
	\$
Total:	\$

Personal expenses

Description	Amount
	\$
Total:	\$

Medical/Dental

Description	Amount
	\$
Total:	\$

Homemaker, caregiver, therapy

Description	Amount
	\$
Total:	\$

Dependant's or spousal allowance

Description	Amount
	\$
Total:	\$

Utility payments

Description	Amount
	\$
Total:	\$

Property maintenance/renovations

Description	Amount
	\$
Total:	\$

Property insurance/taxes

Description	Amount
	\$
Total:	\$

Legal fees

Description	Amount
	\$
Total:	\$

Income taxes

Description	Amount
	\$
Total:	\$

Accounting fees

Description	Amount
	\$
Total:	\$

Bank service charges

Description	Amount
	\$
Total:	\$

Interest expense

Description	Amount
	\$
Total:	\$

Investment expenses

Description	Amount
	\$
Total:	\$

Optional fee paid to the private committee from the prior period

Description	Amount
	\$
Total:	\$

Bonding fees

Description	Amount
	\$
Total:	\$

Public Guardian and Trustee account review fees

Description	Amount
	\$
Total:	\$

Gifts and charitable donations

Description/recipient	Amount
	\$
Total:	\$

Other (specify)

Description	Amount
	\$
Total:	\$

Were any of the expenses listed above paid to the committee(s) or another non-arm's length party? (examples of non-arm's length parties are you, your family members, and your friends. Payments to non-arm's length parties may not be at fair market value and/or may put you in a conflict of interest.)

No **Yes** if yes, please provide a description of the nature and amount of any such payments:

Description	Amount (\$)
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Did you receive a Court Order or the approval of the PGT authorizing certain expenses?

No **Yes** if yes, please provide a description of the nature and amount of any such payments, and send a copy of the Court Order (if applicable).

Description	Amount (\$)
<div style="border: 1px solid black; height: 80px;"></div>	<div style="border: 1px solid black; width: 150px; height: 25px;"></div>

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