

# Private committee review

Limited accounting submission package

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# Why do I file this accounts submission?

The Public Guardian and Trustee is authorized by the [Patients Property Act](#) and the [Public Guardian and Trustee Act](#) to regularly review the accounts of the adult to ensure the private committee is fulfilling their role in the best interests of the adult.

Failure to comply with the reporting requirements can result in your committee being removed

There are 2 types of account submissions for a private committee:

- 1. Full accounting:** involves submitting a report of accounts that may include a detailed expense listing, providing copies of supporting documents, an affidavit, and a review fee is paid by the adult's estate to the PGT as set out in legislation. Typically, this report submission type is every 2-3 years, the estate is over \$25K, and income is over \$20K per year.
- 2. Limited accounting:** involves submitting a report of accounts, requires no affidavit, and few supporting documents, and the adult's estate pays no review fees to the PGT. Typically, this report submission type is every 5 years, the estate is under \$25K, and the adult's income is under \$20K per year.

A full accounting is required the first time you submit your accounts to the PGT for review.

This package, together with the supporting documentation and affidavit, provides the information the PGT requires to conduct the full accounting.

## Important tips

**Start early:** We recommend putting your account submission together after you receive your reminder letter from the PGT.

**Complete all sections:** Include all information

asked for in the form and provide the supporting documentation.

- **Important:**
  - The PGT does not need to see all statements for the entire reporting period but rather statements showing the balance as of the closing date for the period
  - Do not send original documents; the PGT digitizes all materials we receive and destroys all papers we receive after digitization
  - Please keep the originals of all the files you provide, because you may need to provide them to the PGT or the Executor/Administrator. Originals should be kept by you until after the death of the adult for whom you are committee and you are released by the Executor/Administrator of the adult's estate

**Ask for support from the PGT:** If you have any questions or need assistance, please contact the Private Committee Services Department at 604-660-1500 or [PCSadmin@trustee.bc.ca](mailto:PCSadmin@trustee.bc.ca).

## How does this process work?

The account review process is as follows:

### The private committee:

- 1.** You receive a letter from the PGT reminding you when your accounting is due
- 2.** You complete this form and mail it to the PGT along with all supporting documentation and a cheque for the review fee

### The private committee services department:

- Reviews your accounting and communicate the result of the review to you
- If the review finds concerns, a letter is sent to you outlining the issues found and depending on the nature of the concerns, the PGT may provide additional information to help clarify your role or the PGT may take action to end your authority as committee

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

# Background

File number

First name of adult

Last name of adult

Date of birth

Social Insurance Number

Healthcare ID number

Phone

Address

City

Province

Postal code

Name of caregiver (if applicable)

Caregiver phone number

Name of facility/group home (if applicable)

Is the adult involved in any unresolved court cases?

Yes  No

If yes - provide details:

Did the adult have to pay or receive any money from a lawsuit?

Yes  No

**If yes** - provide details:

Did the adult receive an inheritance?

Yes  No

**If yes** - tell us the amount and send an official document from the executor or administrator confirming the inheritance and the dollar value:

Is there any other financial information you think we should know about? Please provide details:

Over the period, has the health of the adult whose affairs you manage changed? Please provide details:

Is there any other information concerning the adult you think we should know about? Please provide details:

## Financial details - income

Income source	Monthly amount
Canada Pension	<input type="text"/>
Old Age Security/GIS	<input type="text"/>
Employment Income and/or assistance	<input type="text"/>
Disability payment	<input type="text"/>
Annuity	<input type="text"/>
Other income	<input type="text"/>

## Financial details - assets and liabilities

Asset or liability type	Financial institution name	Total value
Bank accounts	<input type="text"/>	<input type="text"/>
Term deposits/GICs	<input type="text"/>	<input type="text"/>
Investments, not including registered disability savings plan (RDSP)	<input type="text"/>	<input type="text"/>
Personal property or other assets (Examples: farm vehicles, classic cars, ATVs, trailers, boats, horses, tools, jewellery)		<input type="text"/>
Loans receivables current value (A loans receivable is any money that is owed to the adult from a borrower)		<input type="text"/>
Registered Disability Savings Plan (RDSP) If the market value of the RDSP is over \$50,000 please send the statement showing the closing balance for the review period.		<input type="text"/>
Is there any real estate in the adult's name?		<input type="radio"/> Yes <input type="radio"/> No
<b>If yes</b> - you must enter the market value and send a copy of the property tax assessment		<input type="text"/>

# Update personal information

## Committee information

Please provide detailed information in the fields below.

Last name

First name

Mobile phone

Landline phone

Alternate phone

Email

Mailing address

City

Province

Postal code

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# 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

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