

TRUSTEESHIP NEEDS REPORT

(To be completed only if an order for trusteeship is being applied for)

1. Does the proposed dependent adult receive pension income?

- Old Age Pension
- Canadian Pension Commission
- Canada Pension Plan
- Disability Pension
- Assured Income for the Severely Handicapped (AISH)
- Supports for Independence (SFI)
- Retirement Pension

2. Indicate why an informal trusteeship and/or enduring power of attorney can not be used to assist the proposed dependent adult.

3. Does the proposed dependent adult have other regular sources of income? If yes, name the source.

4. List the approximate monthly amounts of the items referred to in 1 and 3, if known.

5. Does the proposed dependent adult work? If so, where and how are wages paid?

6. Does the proposed dependent adult have self employment income? If so, indicate general source and amount.

7. Provide address and give an estimate of value of all real property owned by the proposed dependent adult.

8. Does the proposed dependent adult have bank accounts? If so, provide addresses and estimated balances.

9. Does the proposed dependent adult have investments? If so, provide details and estimated values of stocks, bonds, Canada Savings Bonds, guaranteed investment certificates, term deposits, mutual funds and other financial assets.

10. Does the proposed dependent adult have any RRSPs or RRIFs? If so, provide details and estimated values or monthly payments.

11. Does the proposed dependent adult own a vehicle? If so, provide make, model and estimated value.

12. Does the proposed dependent adult own furniture and personal effects? If so, provide brief details of them and indicate any items that may be worth more than \$2,000.

13. Does the proposed dependent adult have any interest in any estate or trust? If so, provide details.

14. Has the proposed dependent adult been filing Income Tax returns? If so, provide year of last return and name of person who prepared it, if known.

15. Does the proposed dependent adult have any dependents? If so, provide names and addresses and information concerning any regular payments to them.

16. Indicate briefly the steps you will be taking to administer the proposed dependent adult's estate if a trusteeship order is obtained.

17. Does the proposed dependent adult have a Will? If so, do you know where the original is located?

18. Is the proposed dependent adult involved in any on-going legal proceedings? If so, provide brief details.

19. Are there any matters which require immediate attention if you are appointed trustee? If so, provide details.

Signature

Name of person completing report

Date