

# What To Do When A Public Trustee Client Dies

Office Of The  
Public Trustee

**Government  
of Alberta** ■  
Justice

The Public Trustee is appointed by the Alberta Government under the *Public Trustee Act* to protect and manage the financial interests of vulnerable Albertans. The trust administrators, lawyers, taxation officers, auditors and support staff in the Office of the Public Trustee act on behalf of people with mental disabilities, administer the estates of deceased persons and protect the property interests of minors.

If you are looking after a represented adult who is a client of the Public Trustee, this brochure provides direction about what to do in the event of their death.

### Be Prepared:

- Find out if the person has a Will and make sure you have names and phone numbers for the executor of the Will and the person's next-of-kin.
- Decide who will be responsible for taking an inventory and securing personal effects and property
- Make sure you have a secure area where the personal effects can be stored.

### Who To Contact

- Contact the Office of the Public Trustee and the Office of the Public Guardian (if applicable) to notify them of the death.
- If there is a Will, contact the executor of the Will and advise them to contact the Office of the Public Trustee before making funeral arrangements.

If there is no Will, and you know the names of the next-of-kin, contact the next-of-kin and advise them to contact the Office of the Public Trustee before making funeral arrangements.

If there is no Will, and you do not know the next-of-kin, contact the Office of the Public Trustee to notify them of the death and find out which funeral home needs to be contacted.

If the death occurs on a weekend, you can call the funeral director of your choice to remove the body. At that time advise the funeral director to contact the Office of the Public Trustee on the next business day.

### Next Steps

- Make sure suitable funeral attire is sent to the funeral home with the deceased.
- Inventory all personal effects and property with a witness present, and store them in a secure space until you receive direction from the executor.
- Prepare a statement of accommodation charges from the beginning of the month to the date of death.
- Prepare a statement for the trust account covering the past six months to the date of death.

### Office Of The Public Trustee

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### For More Information:

Visit: [www.justice.gov.ab.ca/public\\_trustee/](http://www.justice.gov.ab.ca/public_trustee/)  
Or, call toll-free: 310-0000, then dial  
780-427-2744 for the Edmonton office, or  
403-297-6541 for the Calgary office