

**Public Guardian and Trustee
of Manitoba**
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POWERS OF ATTORNEY AND THE PUBLIC GUARDIAN AND TRUSTEE

This publication is available in multiple formats upon request. For further information please contact our office at 204-945-2700.



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INFORMATION ON POWERS OF ATTORNEY

WHO QUALIFIES FOR ASSISTANCE?

The Public Guardian and Trustee (PGT) is interested in helping you manage your financial affairs if there is no one else you would like to do this for you.

Trust companies also provide this service and may be willing to accept your business. If you have assets that are valued at \$250,000.00 or over, please contact a trust company first for their assistance. They are listed in the yellow pages under Trust Companies.

If your assets are valued at less than \$250,000.00 or you cannot get a trust company to act for you, then perhaps The Public Trustee can help.

SERVICES OFFERED

The services which we will provide to you are:

- operation of an account into which your cash will be deposited;
- receipt of income for you (such as CPP, OAS, private pensions);
- payment of all your bills and other financial obligations like rent, mortgage payments, and property taxes;
- interest paid monthly on your account at a fluctuating rate based on common fund earnings;
- managing your home for you or helping you sell it;
- filing your income tax.

FEES CHARGED

You will be charged fees every 3 months which are calculated on the amount of money you have on deposit, and on transactions in and out of your account as they occur. Additional fees are charged for income tax preparation, home management or inspection.

* Capital Receipts	2.5%
** Capital Disbursements	2.5%
* Income Disbursements	3.0%
Income Disbursements	3.0%
Annual Asset Management Fee	0.9%
Per Diem Appeal Fee	\$300.00
File Closing Fee - Deceased Clients	\$300.00

* No fees are charged for receipts of income assistance and tax refunds.

** No final capital disbursement fees are charged on closing a client account

PROCESS REQUIRED TO SIGN POWER OF ATTORNEY

If you want The PGT to act for you, you can expect an Adult Services Administrator (ASA) to meet with you to explain the process and how it will operate. If you agree with The PGT process, a lawyer will then meet with you to review the power of attorney and to witness your signature on the power of attorney.

You will need to provide The PGT with a cheque to cover the lawyer's fees prior to meeting with the lawyer.

You will be asked to give an enduring power of attorney, which means that if you become incompetent to make decisions at some time in the future, the power of attorney will remain in force.

CANCELLATION OF POWER OF ATTORNEY

You can revoke a power of attorney at any time when you are competent. However, if you decide to revoke the power of attorney you have given The PGT, we may refuse to be reappointed at a later date. As well, we might decide that

it is no longer feasible to act as your attorney, and will inform you of that and return all funds to you with an accounting.

STANDARDS OF SERVICE

The PGT will assign an Adult Services Administrator (ASA) to handle your affairs. Your ASA or his/her assistant will:

- Contact you annually to arrange a meeting if you wish to meet with the ASA.
- Acknowledge telephone calls within 48 hours. The PGT reserves the right to limit the number of calls returned to you to one per week.
- Deposit cheques for personal needs to your bank account or forward them directly to you. We reserve the right to limit the number of cheques provided to you to one per week.
- At your request, deliver cash to you not more than once per week.
- Acknowledge correspondence with in 10 business days of receipt.

- Pay bills and invoices, when funds permit, within 30 business days of receipt.
- Provide statements to you annually or more often by agreement.
- Prepare an inventory of your belongings upon you request, or when you move to different accommodations.

If you require additional services beyond those listed above, The PGT reserves the right to charge additional fees.

You will be asked to turn over all financial matters to us. If you think that you may have been taken advantage of and would like to recover money from another party, you can meet with one of our lawyers to discuss this. There is an hourly fee charged for this service.