

Checklist: What to bring to your appointment

Guardianship or trusteeship application/review

COMPLETED CAPACITY ASSESSMENT FORM

- ⇒ You need a recent capacity assessment if you are applying for the first time (called an initial application) or if the court has requested a review.
- ⇒ For guardianship and/or trusteeship, you need Form 4.
- ⇒ For co-decision-making, you need Form 3.
- ⇒ No photocopies please. The form must be an original and it must be single-sided.
- ⇒ Be sure the assessor has answered all questions. Section 3 is important. That's where assessor confirms that a medical evaluation was completed to rule out any temporary, reversible conditions that may impact capacity.

2 PIECES OF IDENTIFICATION

- ⇒ Please bring original ID (no photocopies) for each person applying to be a decision-maker for the first time, including alternates. This applies to initial applications and reviews.
- ⇒ The primary piece of ID must be government-issued and must include the name, date of birth, signature and photo. Examples include:
 - Canadian driver's licence
 - Canadian passport
 - Provincial ID card
 - Foreign driver's license
 - Foreign passport (not handwritten)
 - Canadian citizenship card
 - Permanent resident card
 - Certificate of Indian status
 - Federal, provincial or municipal employee ID
- ⇒ The second piece of ID must, at a minimum, include the full first and last name.
 - Library card
 - Student card
 - Transit pass
 - Health card
 - Health membership card
- ⇒ **SIN cards, credit/debit cards are not accepted.**

2 PERSONAL REFERENCES

- ⇒ References are required for each personal applying to become a decision-maker for the first time, including alternates. This applies to initial applications and reviews.

COURT FILING FEE

- ⇒ The cost is \$250 for first time application or \$50 for a review application.
- ⇒ Please bring a cheque or money order made payable to the Government of Alberta.

OTHER DECISION-MAKING DOCUMENTS – IF APPLICABLE

- Personal directive
- Enduring power of attorney
- Previous court order (if completing a review)
- Supported decision-making authorization

ADDRESSES AND PHONE NUMBERS FOR FAMILY MEMBERS AND INTERESTED PARTIES LIVING IN CANADA

- Spouse
- Parents
- Children 18 years of age or older
- Adult interdependent partner
- Brother and sisters 18 years of age or older
- If the adult lives in a facility, the director

APPLYING FOR TRUSTEESHIP

- ⇒ You will need (all that are applicable):
- Copy of certificate of title for land
 - Copy of current bank statement (every bank account owned solely or jointly by the adult).
 - Copy of statement for investment accounts (RRSP, GIC, term deposits, savings bonds, tax free savings account)
 - A list of the adult's other assets and any liabilities
 - The Adult's monthly sources of income and types of expenses
- ⇒ **Examples of investment accounts:**
- Cash balances (e.g. within a brokerage account) or money market instruments (e.g. treasury bills, corporate paper, bankers' acceptances)
 - GICs, term deposits, savings bonds
 - Marketable bonds (e.g. government, municipal, corporate)
 - Common shares, preferred shares, share warrants, limited partnership units
 - Units or shares of mutual funds, exchange traded funds (ETFs), income trusts, gross royalty trusts
 - Life insurance products with a cash value (e.g. segregated funds, whole life policies, variable life policies, universal life policies)
- ⇒ **Other financial assets:**
- Cash on hand
 - Balance in account maintained for adult's use with residential facility
 - Security certificates (e.g. share certificates, gross royalty trust certificates, savings bonds) not held in an investment account
 - Shares of private corporation
 - Shareholder loans to private corporations;
 - Interest in a partnership or sole proprietorship
 - Interest in a trust or in a deceased person's estate
 - Interest in ongoing or potential lawsuit (e.g. personal injury claim)
 - Private debts owed to the adult
- ⇒ **You will be required to also indicate what other assets the adult may have, such as:**
- Cars, trucks, motorcycles, recreational vehicles, off-road vehicles, snowmobiles
 - Farm assets (e.g. equipment, tools, livestock, crops, seed, quotas)
 - Business assets (e.g. equipment, inventory)
 - Household and personal effects
 - Items or a distinct set of items (e.g. a coin collection) if the estimated market value of the item or set is at least \$1000

WHAT TO THINK ABOUT:

- ⇒ You can have more than one guardian or trustee. If you are applying to have two or more (not including alternates), you must decide in advance if they will make decisions jointly or separately (independent of each other). If they are expected to make joint decisions, both must provide consent when a decision is necessary from a service provider (e.g. doctor, financial institution).
- ⇒ Do you want to appoint an alternate guardian and/or an alternate trustee? Alternates **only** have authority to make decisions upon the death or incapacity of the previous guardian/trustee or if they are authorized in writing by the previous guardian/trustee for a specific period of time.
- ⇒ What types of decisions do you plan to make for the adult in the coming years? Training or employment program? New residence? More supports? Medical decisions? Financial decisions? The court will consider this when deciding which areas you have decision-making authority for.
- ⇒ How do you plan to involve and inform the adult about the decisions you will be making?