

# When the Public Guardian and Trustee is committee of estate

Financial and legal decision making  
services for vulnerable adults

# Table of contents

<b>What does it mean to be a committee</b>	<b>1</b>
The need for a committee	1
<b>The PGT as committee of estate</b>	<b>1</b>
PGT and decision making: involving clients, families and others	1
PGT's responsibilities as committee of estate	2
How the PGT gets started as committee of estate	3
Legal issues	3
PGT managing client assets and financial affairs as committee of estate	3
How the PGT manages jointly-held assets	4
If the client is in a care facility	4
If a client's dependents are in need	5
Fees and expenses	5
<b>How to end the PGT's role as committee of estate</b>	<b>5</b>
Summary chart - how to end the PGT's role as committee of estate	5
Legal rights of clients under a certificate of incapability	7
When a client is capable	7
When there is a new private committee	7
<b>When a committee of estate client dies</b>	<b>7</b>
Initial steps	7
Transfer of assets	8
When an executor or family cannot be found	8

# Table of contents

<b>How the PGT manages joint assets as committee of estate</b>	<b>8</b>
When the client owns assets with a spouse	8
Beneficial ownership of assets	8
Shared ownership of assets	8
Joint real property and personal effects	8
Taxes and information-sharing related to joint assets	8
Fees and expenses	8
<b>Client companion contracts for committee of estate clients</b>	<b>8</b>
Companion expectations from the PGT	8
PGT expectations of companions	8
<b>Payments to former residents of Woodlands</b>	<b>8</b>
<b>Contact the Public Guardian and Trustee</b>	<b>9</b>

# What does it mean to be a committee

Committeeship is an arrangement where the Public Guardian and Trustee (PGT), a private individual, or a trust company is granted the authority to manage the affairs of an adult who is incapable of managing their own affairs. The person managing a person's affairs is called a committee.

## There are 2 kinds of committee:

- 1. Committee of estate:** A committee of estate is the person appointed to take care of an adult's legal and financial affairs when an adult cannot make decisions on their own. For example, an adult may have dementia or a severe mental health issue that stops them from paying their bills or dealing with legal issues. A committee may manage income and expenses, take care of investments, operate the adult's bank accounts or maintain property
- 2. Committee of person:** A committee of person is the person appointed to make decisions about health care and living arrangements as the adult may not be able to take care of themselves and may be at risk of other people taking advantage of them. A committee of person may make decisions about where the adult should live, health care or who can visit the adult

## The need for a committee

A committee is needed when an adult cannot make decisions for themselves and may be vulnerable to abuse, neglect or self-neglect.

A committee is needed for an adult only as a last resort, after all other options have been explored. Committeeship is a very serious legal step. It takes away a person's right to decide certain things for themselves.

## Different people and organizations can be committee

A committee of estate or person can be a family member, close friend, trust company or the PGT.

Individuals and companies appointed committee of person or estate are called private committees. The PGT acts as committee as a last resort when there are no family or friends willing or able to take on the role.

For more information about becoming a private committee, see the [Applying to be a private committee](#) page on our website.

## The PGT as committee of estate

When the Public Guardian and Trustee (PGT) is appointed committee of estate, the adult becomes our client. Our duty is to manage clients' finances and legal issues in their best interest. Clients are assigned a case manager who is responsible for making decisions about their financial and legal affairs.

After the PGT is appointed committee of estate, a case manager is assigned and contacts the client by letter and/or by phone call. The case managers also contact the client's support network to learn about the client's unique needs and priorities. As quickly as possible, case managers create individual plans that support the client's needs and independence. For example, many clients can still use their own bank account. They can make decisions about day-to-day things such as grocery shopping and entertainment. In-person visits are arranged with clients within the first 6 months. This is a chance for case managers and clients to meet and talk about clients' needs and wishes and answer any questions clients' have.

## PGT and decision making: involving clients, families and others

We involve clients as much as possible in setting up the plan for managing their finances and big financial decisions. We also involve family and friends as much as we can.

Sometimes, clients do not want us to share their information with other people, even with their family and close friends. How much we involve friends or family depends on:

- Clients' wishes
- Clients' past practices on sharing information
- Clients' ability to understand decisions
- The risk of harm to clients
- The interest and availability of family
- The urgency of the situation and
- Confidentiality

The PGT will not share information with anyone who may have treated the client poorly or is not trusted by the client.

The PGT also works with other people who have legal authority over parts of a client's life. These could include a client's committee of person, or a representative for personal and health care decisions. We may also work with other professionals like social workers, nurses, physicians, or care aides. We do this to ensure our decisions are in the client's best interests. For more information, see the [Details about the different types of representation agreements \(RAs\)](#) page on our website.

## PGT's responsibilities as committee of estate

### Decisions the PGT can make:

Applying for benefits

Receiving income

Paying bills

Contracting for services

Maintaining, purchasing and selling real estate

Managing investments

Preparing tax returns

Supporting legal dependents

Dealing with legal issues

### Decisions the PGT cannot make:

Health care

Living arrangements

Marriage or divorce

Adoption

Voting

Executing a will

Criminal proceedings

Immigration matters

## How the PGT gets started as committee of estate

Case managers let clients know what to expect within the first few months of involvement. For example, the case manager will:

- Provide information about the PGT and our role
- Provide information about a client's rights to challenge the PGT's involvement
- Gather information from clients, family, friends, other supports
- Gather financial information
- Request other PGT staff (Investigators) to visit and inspect clients' residences or properties to make sure they are safe and to make an inventory of assets (except for small household items)
- Conduct a search for a will
- Deal with client legal issues
- Develop client case plans and budgets
- Redirect client mail and arrange for a change of address, where required
- Redirect income and bills
- Gather client tax information for the current and previous years

If clients are interested and able to manage day-to-day expenses, we make sure there are funds in their bank accounts. This supports clients to pay for things such as groceries, transportation or entertainment. For clients living in long term care, we make sure there are funds available for them where they live, so they can participate in activities and are able to pay for any daily needs like haircuts, day trips or snacks.

## Legal issues

Sometimes, clients require assistance resolving different legal matters. The types of legal issues that we assist clients with, include:

- Family law issues, such as divorce or separation
- Estate law, such as updating their will, or varying a will
- Personal injuries, such as a car accident claim

with Insurance Corporation of British Columbia (ICBC)

- Defending the client in legal matters
- Business matters

Case managers work with the client and PGT lawyers to serve the client's best interests.

## PGT managing client assets and financial affairs as committee of estate

The PGT sets up a trust account for each client. This is where the client's cash and income are deposited and from where bills are paid.

The PGT applies for financial and health benefits, redirects existing income or pensions to client trust accounts and pays their bills and expenses from these funds. If clients have debts or are behind in paying their bills, the PGT pays them with their money in their trust accounts. If clients do not have enough money to pay their debts, the PGT settles claims on their behalf, including filing for bankruptcy.

The PGT safeguards or sells assets depending on clients' best interests. In many cases, client circumstances require assets to be sold to pay for their needs. An asset is something that a person owns. It could be real property, jewellery or a stock, including cash.

Below is information about what we do to manage assets, cash and liabilities. A liability is something that a client owes. A debt to be paid like a mortgage or an amount owing on a credit card.

- **Bank accounts:** Whenever possible, we make arrangements for clients to continue to access their bank account. We make sure that restrictions are put in place, such as limiting the amount of daily cash withdrawals or how much money is in the account. This is done to make sure clients are not taken advantage of and stay within their budget. If clients are unable to manage their bank account, it is closed as soon as possible. The money from the bank account is deposited to their trust account. For more information, see the [How the PGT manages joint assets as committee](#) on our website

- **Cash:** All cash is held in client trust accounts or investment accounts with the PGT. For more information, see How we invest clients' money
- **Contents of a Safety Deposit Box:** The PGT opens the safety deposit box, removes the contents and makes sure that whatever was in the safety deposit box is safe – including placing items in the PGT's vault, when required. When the PGT opens a safety deposit box, there are always 2 people present and an inventory is taken
- **Stocks and Bonds:** Investment plans are created for clients with sufficient assets, including stocks and bonds. Stocks and bonds are kept until the client requires access to cash. If the stocks and bonds are sold, the PGT makes every effort to avoid withdrawal penalties
- **Furniture and other personal belongings:** For clients living in the community, furnishings and other belongings are left with them. For clients who move into a care facility or assisted living facility, the PGT makes decisions about their personal belongings with input from clients, families and friends. Some things are sold, and if clients can afford it, some things may be stored in case they may need those items in the future, or perhaps want to give them to family members or friends. Items to be sold are sent to public auction, and the proceeds are deposited to each client's trust account. Items that can't be sold at public auction are disposed of
- **Memorabilia:** Photos and family mementos are often very important to clients and their family members. Efforts are made to preserve or store client photos, family mementos and other special items
- **Real estate:** For clients living in their home or who state in their will that their home is to be given to someone after they die, we make every effort to keep their residence. In some cases, a client's home may be rented. Client homes are rented when the client has enough funds to cover expenses such as taxes, mortgage, repairs, and other costs related to maintaining the property. The PGT uses a property management

company to take care of the client properties. Client homes may be sold if they do not use their property or cannot afford to maintain it. We consult with clients before selling their property. Before client properties are sold, they are appraised to make sure we get the best price. Funds from the sale are deposited into each client's trust account and may be invested. Investing the funds depends on each client's needs and circumstances

- **Motor Vehicles:** In some cases, clients can still drive a motor vehicle. If clients have enough funds, we make sure that costs related to their vehicles, such as insurance and maintenance, are paid. If clients do not drive their vehicles or cannot afford to keep them, the vehicles are sold. Funds from the sale go into each client's trust account and may be invested. Investing depends on each client's needs and circumstances

## How the PGT manages jointly-held assets

The PGT manages joint assets with the client's best interests in mind. This may involve making decisions with joint owners about how the asset will be used and maintained.

Sometimes the PGT needs to sell assets, even when they are jointly-held. We do this when it is in the client's best interest. For example, a client may not be able to afford the cost of maintaining the asset. Or, some assets may need to be sold to pay for the cost of the client's care. The PGT will contact joint owners to discuss the sale of any jointly-held assets. For more information, see the [How the PGT manages joint assets as committee](#) page on our website.

## If the client is in a care facility

The PGT pays residential care fees with the client's money. We will also provide additional money for small purchases if the client has money for these extra purchases.

### If a client’s dependents are in need

A client’s assets may be used to help a dependent who is in need. This depends on:

- The type and amount of help
- The wishes and needs of clients
- The client’s legal obligations to assist the family member

### Fees and expenses

PGT fees are based on the total assets and income of the client and are set out by regulation. The types of fees the PGT charges as committee of estate include income and capital commissions, an asset management fee and a minimum administration fee.

In addition, clients pay the expenses related to investment management, filing taxes, seeking legal advice or managing real property on their behalf.

All fees charged by the PGT are set by the B.C. government in the Public Guardian and Trustee Fees Regulation. For more information, see the [Fees for adult services](#) page on our website.

## How to end the PGT’s role as committee of estate

The Public Guardian and Trustee’s role as committee can end in a variety of ways. In most cases, it is because the client dies. The process to end the role depends on how the PGT was appointed committee in the first place.

If the client has not died, there are different reasons and ways that end the PGT’s involvement in the client’s life.

### Summary chart on how to end the PGT’s role as committee of estate

Reason why the PGT, as committee, may no longer be needed	How the PGT was first appointed as Committee of Estate	Process
Client dies	Court Order or Certificate of Incapability (CI)	The PGT’s role as committee of estate ends once a client dies. All of the client’s assets become part of the client’s estate. The PGT’s estate liaison department takes care of the day-to-day management of the estate’s assets until they are transferred to the executor or administrator.
Client may be capable	Certificate of Incapability	<p>A reassessment of the client’s capability is completed. The case manager will help the client through this process; the client is responsible for paying for any reassessment costs. See information about reassessments below,</p> <p><b>OR</b></p> <p>The client may choose to go to court for a review of their capability and the court decides that the client is capable. The case manager helps coordinate this activity, and the client is responsible for paying any legal fees for going to court.</p>



<b>Reason why the PGT, as committee, may no longer be needed</b>	<b>How the PGT was first appointed as Committee of Estate</b>	<b>Process</b>
Client may be capable	Court Order	<p>The only way to end a court-ordered committee ship is through a new court order. The court must find that the client is capable. The client's case manager can help coordinate this process.</p> <ul style="list-style-type: none"> <li>• It is best if clients have the help of a lawyer to bring an application for a declaration of capability before the court</li> <li>• The court decides who is responsible for any legal fees charged – typically, the client is responsible</li> <li>• The PGT helps the client get a lawyer</li> </ul>
New private committee	Certificate of Incapability or Court Order	<p>The court appoints a private committee</p> <ul style="list-style-type: none"> <li>• The court decides who is responsible for any legal fees charged – typically the adult is responsible</li> <li>• The PGT will work to transition our involvement to the new committee</li> </ul>
The PGT determines that the client no longer requires a committee	Certificate of Incapability as per s. 37 (3) (a) of the Adult Guardianship Act	<p>For the PGT to make this decision, it considers the following:</p> <ul style="list-style-type: none"> <li>• Evidence of the adult's ability to sufficiently manage their financial affairs</li> <li>• The adult's wishes</li> <li>• Whether and how the adult's circumstances have changed</li> <li>• If the original need or reason for authority has changed</li> <li>• If informal arrangements, for example, direct deposit, would be enough to help the adult</li> <li>• Current diagnosis and prognosis of any relevant medical conditions</li> <li>• Whether the adult may need our services soon</li> <li>• The presence of a support network to help the adult. This may include someone who is willing and able to act as a legal representative or pension trustee</li> <li>• Risks to the adult's assets and legal affairs if the PGT does not remain involved</li> <li>• Consultations with health and social supports in the adult's life, including relevant health authority staff and the adult's physician</li> </ul>

## Clients under a certificate of incapability have the following legal rights:

- **Second assessment:** Within 40 days after the PGT notifies clients that the PGT is appointed committee of estate, clients, or a person acting on behalf of clients, may ask for a second assessment
- **Reassessment:** Clients have the right to request a reassessment every 12 months from the previous assessment date
- **Court review:** Following a second assessment or reassessment, clients have the right to apply to the court to ask the court to review the assessment of incapability to see if it stands
- **Getting a copy of the assessment of incapability:** Clients have a right to obtain their personal information. They can speak to their case manager about getting a copy of the assessment of incapability or any other records

Case managers can explain these rights to clients and will help with these requests. Clients may choose to speak directly with their own doctor, or to a lawyer about these rights if they wish.

## When a client is capable

When PGT's role as committee ends, we transfer the client's assets sets to the client. Clients can expect the PGT to:

- Inform relevant parties the PGT is no longer involved
- Return all assets to the client
- Redirect income and bill payments back to the client
- Provide information about finances, priority issues, any existing legal matters, and community resources
- Answer any questions

## When there is a new private committee

We transfer the client's assets and any outstanding legal issues to the new private committee to

manage. Our goal is to make sure there is a smooth and successful transition for the client. We help the private committee to understand their duties. We also provide the new committee:

- Important financial information
- Status of any existing legal matters
- Priority issues
- Helpful community resources and contact information

Private committees are asked to sign a document releasing the PGT from any claims related to our role as committee.

If the committee cannot manage the client's affairs at any time, the PGT becomes the default committee. For example,

- If the private committee dies
- If the private committee's authority is taken away

For more information, see the [Private committee services page on our website.](#)

## When a committee of estate client dies

The Public Guardian and Trustee's role as committee of estate ends once a client dies. All of the client's assets become part of the client's estate. The PGT's estate liaison department takes care of the day-to-day management of the estate's assets until they are transferred to the executor or administrator.

## Initial steps

### When a client dies, PGT staff:

- Make funeral arrangements, unless there is an executor or family member who plans to apply to be appointed as the administrator. If the executor or the family are making the arrangements, we ask that they consult the case manager to make sure there are enough funds to pay the related expenses
- Order a death certificate from the funeral home

- Let all income sources, creditors and Canada Revenue Agency know of the client's death
- Try to find the executor or next of kin qualified to administer the estate, if this information is not already known
- Give information about estate assets to the executor or next of kin, so they can make an application to the court for a representation grant to administer the client's estate. Sometimes called an estate grant, a representation grant is a document that says who has been legally proven to be the executor named in a will
- Complete a review of the PGT's management of the client's finances, including a review of fees
- Continue to safeguard the client's assets, collect the client's income and pay any bills until they can be transferred

If the client had a will, the will sets out what is done with the assets. A will is a legal document that the client left, and it lets the court know what to do with the client's estate. The will usually names an executor to process the estate. The will can name one or more executors and can also name alternate executors if someone is unable to take on the role. The executor, or executors, are responsible for carrying out the instructions in the will and administering the estate.

If there is no will, the person is said to have died intestate. Provincial laws set out what happens to the client's assets. The person who will process the estate is called the administrator. An administrator is responsible for administering the state of someone who died: like an executor, but appointed by a court.

For more information on responsibilities of the executor and the administrator see the [Wills and estates](#) page on our website.

Executors and administrators are responsible for making sure assets go to the client's beneficiaries as set out in their will or the intestate successors, the person (or persons) who are entitled to receive all or part of an intestate estate, as set out in legislation.

## Transfer of assets

When an executor or administrator applies to the court to process an estate, the court will issue a representation grant. This grant authorizes the executor or administrator to receive the funds and assets in the estate. The PGT needs a copy of the representation grant before we can transfer the assets to the executor or administrator. Executors or administrators are asked to sign a document releasing the PGT from any claims by the estate. For some estates with low-value assets, a representation grant may not be required. Contact the Estate Liaison department for more information.

## When an executor or family cannot be found

Sometimes, a client's executor or family member cannot be found. In other cases, the client's family members are not able to administer the client's estate. When this happens, our estate liaison department refers the estate to the PGT's Estates and Personal Trust Services division. The estate administration department may administer the estate.

When there is no will, the executor does not want to act or no family is found, and the value of the estate is low, the estate is not administered by the PGT and the monies are sent to the [B.C. Unclaimed Property Society](#) (BCUPS). BCUPS is a not-for-profit society that holds unclaimed property and looks to reunite that property with the rightful owners.

## If a client's assets have been transferred to the BCUPS

Claimants should contact BCUPS directly.

**Toll free**  
**Email**

1-888-662-2877  
[info@bcunclaimedproperty.bc.ca](mailto:info@bcunclaimedproperty.bc.ca)

## How the PGT manages joint assets as committee of estate

The Public Guardian and Trustee (PGT) manages joint assets with the client's best interests in mind. This may involve making decisions with the joint owner about how the asset will be used and maintained.

Sometimes we need to sell assets, even when they are jointly-held. We do this when it is in the client's best interest. For example, a client may not be able to afford the cost of maintaining the asset. Or, some assets may need to be sold to pay for the cost of the client's care. We will contact joint owners to discuss the sale of any jointly-held assets.

If the client's circumstances change or the current arrangements are no longer in the client's best interests, we will discuss alternate options with the joint owners. We consider the client's current wishes and takes the views of involved family and friends into consideration.

Sometimes, banks and other financial institutions need decisions in writing, from the client and the joint owner(s), when requesting changes to an account. The case manager will contact the joint owners to get this in writing. If everyone cannot agree, the bank may prevent the client and others from accessing the asset. In these situations, a court order may be required to solve the matter.

### When the client owns assets with a spouse

Often, the client jointly owns assets with their spouse. We will contact the client's spouse to share information needed for filing tax returns, including:

- Social insurance numbers
- Birthdates
- Net income

We will also consider income splitting or transferring of tax credits between spouses, based on the couple's needs and best interests.

### Type of joint ownership of assets

In B.C., there are 2 kinds of joint ownership:

- 1. Joint tenancy:** The joint owners hold an equal interest in the asset. When one owner dies, the asset passes directly to the surviving owner once the appropriate paperwork is done. This is called the right of survivorship. In most cases, joint tenancy is arranged so that when a client's spouse dies, the asset can quickly and easily pass directly to the surviving spouse
- 2. Tenancy in common:** Each owner has a separate interest in the asset. This separate interest can be equal or unequal. When one owner dies, that owner's share forms part of their estate and does not pass automatically to the surviving owner or owners

### Beneficial ownership of assets

Sometimes, the original owner of an asset names a joint owner for the asset so the joint owner can help take care of the asset. The original owner, does not intend for the joint owner to automatically benefit from the asset after they die. In this case, the original owner is the beneficial owner. When the PGT is appointed committee of estate, joint ownership is reviewed to determine if the client is the beneficial owner and will work with the joint owner on the decisions about the asset.

Sometimes, the client decides to add a joint owner to an asset because they want the asset to transfer to the joint owner after they die, but while they are alive, the client planned to have full use and benefit of the asset. In this situation, we consider the client the 100% beneficial owner, but leave the joint ownership in keeping with the client's estate plan. While the client is the beneficial owner and is alive, any income or capital receipts are deposited to the client's trust account at the PGT.

### Shared ownership of assets

This means that all asset owners share in the ownership of the property. When this is the case, we determine the client's beneficial interest to be what is shown on the property. For example, if there are 4 owners, the client has one quarter ownership. If any

of the owners die, their share is divided among the remaining owners.

When the PGT is committee for a client who has a shared ownership, we make decisions in the best interest of the client. We will agree to the asset being managed as it was when the client was capable, unless this is no longer in the client's best interest. We will discuss alternative options with the other owners if this occurs.

## **Joint real property and personal effects**

Real property is a land and anything that is permanently attached to it. It can be residential, commercial, agricultural or industrial. For example, a house, condo or farm. Real property must be insured, including personal effects that may be inside the property. Unless the joint owners have purchased insurance that protects the client's interest, we will arrange for the insurance. Staff or contractors will visit the property to check its condition for insurance purposes and to manage the property as needed. The case manager works with the joint owner to determine who will pay for the property to be maintained and for the expenses, such as property taxes and utilities.

### **Sharing costs when the client is living with a spouse or others in a property**

We will generally continue existing arrangements for property-related costs, unless the client can no longer afford those costs.

### **Sharing costs when the client is not living in a property**

Before assisting with costs, we will review what the client was doing in the past, if the client can afford to assist with costs, and if the client is legally required to assist with the costs. If the client cannot afford to assist with the costs, we will discuss selling the property and the personal effects with the joint owner.

### **The sale of jointly owned real property**

When jointly owned real property is to be sold, we usually arrange and manage the sale. To do this, we work with the joint owner in all aspects of the process. The PGT also works with the joint owner to

decide whether to move, sell, give away or dispose of any jointly-owned personal effects.

### **Jointly-owned vehicles**

We work with the joint owner of a vehicle to decide:

- Whether to continue to maintain the vehicle or
- Transfer the client's interest in the vehicle to the joint owner or another party

If the client is using or driving the vehicle, we make sure it is insured.

### **Joint bank accounts or investments**

We consider the nature and purpose of the joint account when it was set up, to determine if it should remain open, if the client should remain a joint holder or if the other party should potentially be removed as a joint holder. We also work with the joint holder on issues such as taxes with respect to the joint asset. The case manager deals with each situation individually.

### **Joint liabilities**

We review the client's liabilities to determine if they are responsible for them. We will also discuss how to manage payments with any joint debtors.

## **Taxes and information-sharing related to joint assets**

When the PGT is committee of estate, we are responsible for filing the client's income tax returns. When filing tax returns, we consider many things, including the impact on the client's future care costs.

For jointly-owned assets, reporting is coordinated with the joint owner or owners.

## **Fees and expenses**

Fees are based on the total assets and income of the client and are set out by regulation. The types of fees the PGT charges as committee of estate include income and capital commissions, an asset management fee and a minimum administration fee. Expenses related to filing taxes, managing investments, seeking legal advice or managing real

property on the client's behalf are also paid for by the client.

All fees charged by the PGT are set by the B.C. government in the [Public Guardian and Trustee Fees Regulation](#). For more information, see the [Fees for adult services](#) page on our website.

## Client companion contracts for committee of estate clients

Companions can improve the quality of life for many adults. Companions offer activities and services based on the client's needs and wishes. These can include:

- Helping to connect with family and friends
- Providing support to take part in community activities
- Assisting in care home settings
- Helping with transportation for shopping or medical appointments

### **A companion service may be set up when:**

- The client has enough funds to pay for the service
- The client has asked for the service
- The family has suggested that a companion would improve the client's quality of life
- Other professionals suggest that a companion would improve the client's quality of life

## Companion expectations from the PGT

### **Companions of a PGT client can expect:**

- A clearly outlined contract that describes the types of services and supports the client needs
- Revisions to the contract if the client's needs change

- Responsive communication with the PGT case manager overseeing the client's affairs
- Notification of a change required to the contract or to the services. For example, a client may be receiving support services at home but has been temporarily hospitalized. The case manager will either suspend the services or may request that the companion visit the client while in hospital

## PGT expectations of companions

### **The PGT expects that the companion will:**

- Provide services as outlined in their contract
- Provide regular progress reports on the services they have provided. If the PGT is also committee of person, we ask that they give details on the client's needs
- Let the case manager know of any physical, mental, financial abuse or neglect
- Let the case manager know of any changes the client may need
- Inform the case manager of any changes in the client's situation that may change the contract. If the PGT is also committee of person, we ask that they notify us of any changes in the client's situation
- Get pre-approval if the companion needs to increase their hours of work. Each client's financial circumstances are unique and decisions are made on a case-by-case basis
- Send monthly invoices that are consistent with the contract
- Comply with all other contract provisions

If you think a PGT client could benefit from companion services, or there are concerns or inquires about companion services, please contact the client's case manager.

You can send invoices to [invoices@trustee.bc.ca](mailto:invoices@trustee.bc.ca).

# Payments to former residents of Woodlands

Woodlands, or Woodlands school, was a provincial institution in New Westminster, B.C. In the early 2000s, 2 investigations were conducted, one by the province and one by the Public Guardian and Trustee (PGT). These reports confirmed that residents of Woodlands were abused.

In 2018, the B.C. government announced that it would make payments of up to \$10,000.00 to all former residents of Woodlands school. This payment included pre and post 1974 residents of Woodlands.

In many cases, the money paid to former residents was sent to the PGT to manage as trustee. As trustee, the PGT manages the monies on the former residents' behalf.

If you have questions about accessing these funds, please contact us at [clientservices@trustee.bc.ca](mailto:clientservices@trustee.bc.ca) for assistance.

# Contact the Public Guardian and Trustee

## Greater Vancouver Regional Office

700-808 West Hastings Street  
Vancouver, B.C. V6C 3L3

**Phone** 604-775-1001  
**Fax** 604-660-9498  
**Email** [sta@trustee.bc.ca](mailto:sta@trustee.bc.ca)

## Interior-North Regional Office

1345 St. Paul Street  
Kelowna, B.C. V1Y 2E2

**Phone** 250-712-7576  
**Fax** 250-712-7578  
**Email** [sta@trustee.bc.ca](mailto:sta@trustee.bc.ca)

## Vancouver Island Regional Office

1215 Broad Street  
Victoria, B.C. V8W 2A4

**Phone** 250-356-8160  
**Fax** 250-356-7442  
**Email** [sta@trustee.bc.ca](mailto:sta@trustee.bc.ca)

## Toll free calling

Toll free calling is available through Service B.C.  
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

## General inquiries

For questions unrelated to the information in this  
publication.

**Email** [mail@trustee.bc.ca](mailto:mail@trustee.bc.ca)  
**Website** [www.trustee.bc.ca](http://www.trustee.bc.ca)

## PGT hours of operation

Monday to Friday 8:30am to 4:30pm