

**MANAGEMENT PLAN**

**Note:** *Where the document is completed as part of an application for court appointed guardianship of property, please insert general heading and court file number.*

A. This Management Plan is provided as part of the application made by:

\_\_\_\_\_ (Full names(s) of applicant(s))

to be appointed as guardian of the property of

\_\_\_\_\_ (Full name of person for whom guardianship is sought)

To the best of my knowledge and belief, the assets, liabilities, income and expenditures of

\_\_\_\_\_ (Name of person for whom guardianship is sought)

at this date are stated below. My plans for managing them and the reasons for these plans are as follows:

*Complete the parts below that apply to the finances of the person for whom guardianship is sought. Attach additional pages if the space below is insufficient. Where a part does not apply, write 'None' or 'Not Applicable' in the space provided.*

B. **LAND:**

Type and address of property or properties	Estimated market value
<b>TOTAL:</b>	

**PLAN:**

*For each of the above noted properties indicate your plans (e.g., sell at market value, lease at market value, other), the anticipated time frame for completing the transactions, if applicable, and your reasons for these plans:*

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

C. **GENERAL HOUSEHOLD ITEMS AND VEHICLES:** *(Give general description for vehicles, list year, model, make.)*

Item	Particulars	Estimated Current Market Value
General Household:		
Vehicles:		
<b>TOTAL:</b>		

**PLAN:**

*Explain your plans for these items (e.g., retain for use of person for whom guardianship is sought, sell at market value, place in storage, gift, other) and your reasons for these plans:*

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**D. VALUABLES** (including antiques, art, collectibles, jewellery):

Item	Particulars	Estimated Current Market Value
		<b>TOTAL:</b>

**PLAN:**

Explain your plans for these items (e.g., sell at market value, place in storage, other) and your reasons for these plans:

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**E. SAVINGS AND SAVINGS PLANS** (include cash, assets in financial institutions, registered retirement or other savings plans, deposit receipts, pension plans etc.):

Category	Institution	Account Number	Current Amount or Value
			<b>TOTAL:</b>

**PLAN:**

Explain your plans for the savings described above (e.g., close current accounts and consolidate in a trust account, deposit cash, maintain savings plans, collapse plans as required to meet ongoing expenditures, etc.) and your reasons for these plans:

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**F. SECURITIES AND INVESTMENTS** (include bonds, shares, warrants, options, debentures, notes and any other securities):

Category	Number	Description	Estimated Current Market Value
			<b>TOTAL:</b>

**PLAN:**

Explain your plans with respect to the above-noted securities and investments (e.g., maintain in current form, renew as required, convert, redeem, etc.) and your reasons for these plans:

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**G. ACCOUNTS RECEIVABLE** *(include all debts owing to person for whom guardianship is sought):*

Particulars	Amount
<b>TOTAL:</b>	

**PLAN:**

*Explain your plans regarding collection of the above-noted debts and your reasons for these plans:*

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**H. BUSINESS INTERESTS:** *(Show any interests owned by the person for whom guardianship is sought in an unincorporated business. An interest in an incorporated business may be shown here or under Securities.)*

Name of Firm or Company	Interest	Estimated Current Value
<b>TOTAL:</b>		

**PLAN:**

*Explain your plans regarding the above-noted business interests (e.g., maintain, dissolve, sell, etc.) and your reasons for these plans:*

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**I. OTHER PROPERTY:** *(Show any other property owned by the person for whom guardianship is sought and which is not shown above.)*

Category	Particulars	Estimated Current Market Value
<b>TOTAL:</b>		

**PLAN:**

*Explain your plans for the property described above and the reasons for these plans:*

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J. **LIABILITIES:** *(Show the debts owed by the person for whom guardianship is sought including personal loans, credit card balances, outstanding bills, income tax owing, etc.)*

Description of Debt	Particulars	Amount of Debt
		TOTAL:

**PLAN:**

*Explain your plans with respect to these debts and the reasons for these plans:*

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K. **INCOME:** *(Show net income from all sources on an annual basis.)*

Type of Income	Particulars	Approximate Annual Amount
Pension		
Employment		
Interest		
Rental		
Business		
Other		
		TOTAL:

**PLAN:**

*Explain your plans for the collection, deposit and allocation of the income described above:*

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L. **EXPENSES:** *(Describe the expenses, calculated on an annual basis, which you anticipate will be required to be made on behalf of the person for whom guardianship is sought.)*

Expense	Particulars	Approximate Annual Amount
Residential		
Utilities		
Recreational/Entertainment		
Travel		
Personal Care		
Support for Dependents		
Property Maintenance		
Gifts		
Loans		
Charitable Donations		
Other		
		TOTAL:

**PLAN:**

*Explain below:*

(a) *Whether any of the payments described above are of direct or indirect financial benefit to you, a person you live with or to whom you are related. If so, please explain why these payments are necessary and appropriate:*

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(b) *Whether any significant increases or decreases in the above expenditures are anticipated, or whether any additional expenditures are likely. If so, please explain:*

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(c) *Whether the expenditures listed above will adequately meet the personal needs and maximize the enjoyment of life of the person for whom guardianship is sought:*

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(d) *If you are planning to make gifts, loans or charitable donations, please explain the reasons why you believe these expenditures are appropriate:*

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(e) *If payments to dependents, or for their benefit, are required please provide details about the nature of these payments and the reasons for them:*

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(f) *Are there any expenditures which others have recommended which you are not planning to make? If so, please explain:*

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M. **LEGAL PROCEEDINGS:** *(Identify any current legal proceedings relating to property to which he or she is a party including any civil or criminal proceedings.)*

Nature of Legal Proceedings	Status of Proceedings

**PLAN:**

(a) *Please explain your plans in respect of these proceedings:*

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*Do you anticipate that legal proceedings may need to be commenced or defended on the person's behalf in respect of his or her property? If so, please explain:*

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(b) *What arrangements for legal representation for the person have been made or do you propose?*

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(c) *Are you aware of any existing court orders or judgments which are relevant to the management of the person's property? If yes, describe or attach copies.*

Yes    No            If yes, describe: \_\_\_\_\_

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N. **ADDITIONAL INFORMATION:**

(a) I have consulted with the person for whom guardianship is sought in making this plan: *(check one)*

Yes    No            If no, please provide reasons: \_\_\_\_\_

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(b) I have consulted with the following other people in preparing this plan:

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(c) To the best of my knowledge, the person for whom guardianship is sought would not object to any aspect of this management plan: *(check one)*

Yes, would object

No, would not object

If yes, please explain: \_\_\_\_\_

(d) I am aware of my duty to encourage the participation of the person for whom guardianship is sought in decisions I may make and to consult with supportive family and friends and caregivers. My plans to do so are as follows: *(briefly describe)*

(e) I am aware that I would, as guardian of property, be required to make reasonable efforts to determine whether the person for whom guardianship is sought has a will and, if so, what the provisions of the will are and I am entitled to obtain the incapable person’s will. My plans to do so are as follows:

(f) I am aware that I am not to dispose of property that I know is subject to a specific testamentary gift in the will of the person for whom guardianship is sought unless the specific testamentary gift is of money or if the disposition of that property is necessary to comply with my duties as guardian of property or to make a gift of the property to the person who would be entitled to it under the will, if the gift is authorized by section 37 of the *Substitute Decisions Act, 1992*.

**SUBSECTIONS 32(10) and 32(11) OF THE *SUBSTITUTE DECISIONS ACT, 1992*, PROVIDE:**

**ss.32(10): A GUARDIAN SHALL ACT IN ACCORDANCE WITH THE MANAGEMENT PLAN.**

**ss.32(11): IF THERE IS A MANAGEMENT PLAN, IT MAY BE AMENDED FROM TIME TO TIME WITH THE PUBLIC GUARDIAN AND TRUSTEE’S APPROVAL.**

**SUBSECTIONS 89(5) AND 89(6) OF THE *SUBSTITUTE DECISIONS ACT, 1992*, PROVIDE:**

**ss.89(5): NO PERSON SHALL, IN A STATEMENT MADE IN A PRESCRIBED FORM, ASSERT SOMETHING THAT HE OR SHE KNOWS TO BE UNTRUE OR PROFESS AN OPINION THAT HE OR SHE DOES NOT HOLD.**

**ss.89(6): A PERSON WHO CONTRAVENES SUBSECTION (5) IS GUILTY OF AN OFFENCE AND IS LIABLE, ON CONVICTION, TO A FINE NOT EXCEEDING \$10,000.00.**

\_\_\_\_\_

Date

\_\_\_\_\_

Signature of proposed Guardian (s) of property

Name (s) (please print) : \_\_\_\_\_

Address (es) : \_\_\_\_\_

Telephone number (s) : \_\_\_\_\_