

Residential client user fees

When to refer to the Public Guardian and Trustee

When there are concerns that an adult in a residential facility is no longer able to manage their financial affairs, or that a financial substitute decision maker (i.e. a power of attorney, representative, committee or pension trustee) for an incapable adult is abusing or mismanaging the adult's finances, a referral may be made to the Public Guardian and Trustee (PGT) for further investigation.

Concerns about abuse, neglect and self neglect may also be reported to a designated agency under the Adult Guardianship Act (i.e. the health authorities and Community Living BC).

These concerns are often first noted when user fees are not being paid or other needs of the adult are not being met. However, the PGT has no role in mediating disputes between the adult or the adult's financial substitute and a facility regarding the applicable rate or services to be provided.

In these situations, the parties may access other available dispute resolution resources.

Purpose and possible outcomes of a PGT investigation

- The PGT investigates concerns pursuant to its authority under the Public Guardian and Trustee Act to determine whether or not the adult who may be incapable requires assistance to manage their financial affairs
- If assistance is required, the PGT investigates further to determine if informal resolutions are appropriate or to identify whether there is someone in the adult's life who may assist
- If there is no abuse or mismanagement, the PGT will end its investigation
- If the adult requires assistance and there is no one able to assist, the PGT may seek legal authority to manage the adult's financial affairs, usually as committee of estate (see below)
- The PGT does not conduct an investigation solely to address disputes about the adult's debts

PGT authority to protect assets during an investigation

- If there are concerns that an adult's assets are in need of immediate protection, the PGT has authority to take steps to protect the adult's assets. This includes restricting access to the adult's bank account for up to 120 days
 - When access to an account is restricted, the PGT may direct that access be limited to amounts required for food, shelter and daily living
 - The PGT may also direct that preauthorized payments such as rent, user fees, mortgage payments, or insurance be continued
- When exercising its authority to protect assets, the PGT does not have authority to:
 - manage the adult's financial affairs,
 - set up new payments or authorize payments to creditors,
 - direct a financial substitute decision maker, or
 - establish facility user rates or repayment plans for overdue amounts.

How PGT obtains authority to manage the adult's financial affairs

- The PGT has authority to manage an adult's affairs if the PGT becomes committee of estate
- The PGT will take steps to become committee of estate if:
 - concerns about a financial substitute decision maker's management cannot be resolved, or
 - the adult requires assistance and there is no one else available or appropriate to assist
- A court order or a certificate of incapability is required to become committee of estate. Either process can take up to 6 months or longer depending on the circumstances and complexities and as a result, may not be appropriate in some circumstances

Settling unpaid user fees when the PGT becomes committee of estate

- Upon appointment as committee, the PGT gathers information about all of the adult's assets and liabilities. If sufficient funds are confirmed to be available, monthly user fees are paid. Generally, the minimum user fee rate is paid until the applicable rate is determined
- Once full financial information is available, the PGT will review and assess claims for all debts, including unpaid user fees. Approved claims are paid promptly when sufficient funds are available. Where necessary, a repayment plan is established with the facility

- The PGT must authorize all debt repayments. The PGT does not authorize facilities to access the adult's comfort account for repayment of user fees

Payment of user fees and other expenses after the adult's death

- If the PGT is the committee, the PGT has authority to continue to preserve assets until a personal representative is appointed to administer the estate
- Pending appointment of the personal representative, the PGT as committee may advance funds for funeral expenses and pay recent invoices (e.g. last month's user fees or pharmacy bills). All other payments to creditors cease and must be addressed by the personal representative
- If the PGT is appointed executor in the adult's will, or applies to be appointed by the court to administer the estate, the estate is managed by the Estate and Personal Trust Services division of the PGT

For more information on our services, visit the PGT website at www.trustee.bc.ca.

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

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

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

Toll free calling

Toll free calling is available through Service BC. 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
Website www.trustee.bc.ca

PGT hours of operation

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