

Guardianship & Trusteeship Checklist

1

Capacity Assessment Report (CAR)

- Copy of Capacity Assessment Report Doctor, Psychiatrist, or qualified Psychologist may complete the form after young adult's 17th birthday.
- Must include full legal name (first, middle, last name) & current address.
- All questions must be answered.
- Indicate 'Not Applicable' if the question does not apply to the young person.
- Signature with name, date, & location of the Doctor/Psychologist who completed the form.

2

Bank Documents

- Bank statement sample.
- RESP statement sample (please see our website)
- RDSP statement sample (please see our website)
- Most recent bank, RDSP & RESP statements (ONLY if these accounts are already open).
- The young person must be listed as the sole beneficiary on all bank account statements.
- The young person must be listed as the beneficiary on all the RDSP and RESP statements.

3

Guardian(s) & Trustee(s)

- Each guardian and trustee, including alternate guardian and trustee, will need three references (legal name, phone number, and email address).
- References may be anyone who is not listed on the application, is of legal age in the area which they live, and must have capacity.

Contact our team for any assistance.

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