

# Guardianship & Trusteeship Checklist

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## 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.

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## 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.

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## 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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