



Inventory by private writing (before two witnesses)

| | |
|--|----------------------------------|
| Name of tutor(s) | No of the Curateur public's file |
| Name of the represented adult or minor | Date the file was opened |

1. Identification of the represented adult or minor

| | | | |
|---|-----------|-------------|---|
| Last Name | | First Name | |
| Address <small>number, street, city</small> | | Postal code | Date of birth <small>yyyy-mm-dd</small> |
| Telephone at home | Cell. No. | Email | |

2. Identification of the tutor(s)

| | | | |
|---|-----------|--|-------------|
| Last name (tutor 1) | | First name (tutor 1) | |
| Relationship with the represented person | | Same address as the represented person <input type="checkbox"/> Yes <input type="checkbox"/> No | |
| Address <small>number, street, city</small> | | | Postal code |
| Telephone at home | Cell. No. | Email | |
| Last name (tutor 2) | | First name (tutor 2) | |
| Relationship with the represented person | | Same address as the represented person <input type="checkbox"/> Yes <input type="checkbox"/> No | |
| Address <small>number, street, city</small> | | | Postal code |
| Telephone at home | Cell. No. | Email | |

3. Witness identification (mandatory)

| | | | |
|---|-----------|------------------------|-------------|
| Last name (witness 1) | | First name (witness 1) | |
| Address <small>number, street, city</small> | | | Postal code |
| Telephone at home | Cell. No. | Email | |
| Last name (witness 2) | | First name (witness 2) | |
| Address <small>number, street, city</small> | | | Postal code |
| Telephone at home | Cell. No. | Email | |



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| 4. ASSETS (patrimony) | | | | As of the date the file was opened | |
|---|--|--|--|------------------------------------|----------------------------|
| 1. Cash/petty cash from the housing resource; uncashed cheques | | | | | |
| Cash/petty cash from the housing resource | | | | \$ | |
| Uncashed cheques (specify): _____ | | | | \$ | |
| 2. Bank accounts | | | | | |
| Name and address of financial institution | | | Account numbers | | |
| | | | \$ | | |
| | | | \$ | | |
| | | | \$ | | |
| 3. Investments | | | | | |
| Name and address of financial institution | | | Account numbers | | |
| | | | \$ | | |
| | | | \$ | | |
| | | | \$ | | |
| | | | \$ | | |
| 4. Accounts receivable | | | | | |
| Name and address of debtor | | | Interest rate | | Capital balance receivable |
| | | | | | \$ |
| | | | | | \$ |
| | | | | | \$ |
| 7. Mortgages receivable | | | | | |
| Name and address of debtor | | | Deadline yyyy-mm-dd | | Capital balance receivable |
| | | | | | \$ |
| | | | | | \$ |
| | | | | | \$ |
| 8. Buildings and land | | | | | |
| Address number, street, city | | | Postal code | | \$ |
| Cadastral designation | | | Indicate if this value represents <input type="checkbox"/> the latest municipal assessment <input type="checkbox"/> the most recent certified appraisal report | | |



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| | | |
|--|--|----------------------------|
| 8. Buildings and land (suite) | | |
| Address number, street, city | | Postal code |
| Cadastral designation | Indicate if this value represents <input type="checkbox"/> the latest municipal assessment <input type="checkbox"/> the most recent certified appraisal report | \$ |
| 9. Prearranged funeral contract (in the case of tutorship for an adult) | | |
| | | \$ |
| 10. Vehicles (automobile, ATV, motor home, boat, etc.) | | |
| | | \$ |
| 11. Life Insurance (indicate the cash surrender value, only if there is one, in the case of tutorship for an adult) | | |
| Company name | Policy number | Cash surrender value \$ |
| 12. Furniture and personal effects valued over \$100 with details (including jewelry and art) | | |
| Number | Description | \$ |
| | | \$ |
| | | \$ |
| | | \$ |
| 13. Other assets (specify with details) | | |
| | | \$ |
| | | \$ |
| Total assets (patrimony) | | \$ |

| | | |
|---|--|---|
| 5. LIABILITIES (debts) | | As of the date the file was opened |
| 14. Bank loans (personal loans and lines of credit used) | | |
| Name and address of financial institution | | Principal balance due |
| | | \$ |
| | | \$ |
| 17. Mortgage payable | | |
| Name and address of creditor | | \$ |



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| | |
|----------------------------------|----|
| 18. Other liabilities | |
| Name and address of creditor | \$ |
| | \$ |
| | \$ |
| Total liabilities (debts) | \$ |

Describe any contingencies that could cause the value of the represented adult's or minor's estate to change.

6. Statements, copy(ies) and signature(s) by the tutor(s)

I, the undersigned, _____, declare that:

Name of the tutor

- I have no debt or claim against the person I represent regarding their property, except for the following:

- this inventory is a complete and accurate statement of the assets of the person I represent to date, and I undertake to make any corrections that may become necessary as a result of the discovery of new facts.

I have provided a copy of this inventory to members of the tutorship council as of: _____

yyyy-mm-dd

(For tutorship of adults only)

I have given a copy of this inventory to the tutor of the person as of: _____

yyyy-mm-dd

In witness whereof, I have signed this inventory at _____

City

| | |
|--|--------------------|
| Signature(s) of the tutor(s) | Date(s) yyyy-mm-dd |
| Signatures of two witnesses of this inventory | Date(s) yyyy-mm-dd |



Inventory by private writing (before two witnesses)

INSTRUCTIONS for tutors who must provide an inventory by private writing (before two witnesses)

You have the option of providing a notarized inventory or an inventory by private writing (before two witnesses). Note that these persons do not have to be present when the inventory is prepared.

If you are administering the property of more than one person, you must complete a form for each person.

Please return a completed form and retain a copy for your records. You must also give a copy to the tutorship council. The law requires you to make an inventory of the property of the person you represent within two months of taking office as tutor or mandatary.

1. to 3. IDENTIFICATION

Enter in these sections:

- The first and last names, date of birth, address, phone number and Email of the represented adult/minor;
- Your first and last names, address, phone number and Email;
- The first and last names, addresses, telephone numbers and Emails of both witnesses;
- The date the file was opened.

Please note: If you need more space, you may continue on a sheet of paper and attach it to this document.

4. ASSETS (PATRIMONY)

All amounts entered must be as of the date the file was opened.

Line 1: Cash/petty cash from housing resource; uncashed cheques

Record the cash in the estate of the represented adult or minor, cheques that have not yet been cashed or deposited, or the petty cash held in their housing resource.

Line 2: Bank accounts

Enter the number of each bank/folio account and the balance as of the date the file was opened. Also include the name and full address of the financial institution.

Line 3: Investments – name and address of financial institution

Enter the number and value of each investment as of the date the file was opened. As well, enter the full name and address of the investment companies/financial institutions, e.g., RDSP, TFSA, RRSP, RRIF, LIRA, GIC, mutual funds, stocks, bonds, etc.

Line 4: Accounts receivable

Enter amounts owed to the represented adult or minor (e.g., a tax refund, an upcoming estate, a court settlement, etc.). If you do not know the exact amount, please enter \$1.

Line 7: Mortgage receivable

Not to be confused with a mortgage payable (box 17).

Enter the amounts loaned in the name of the person you represent on real property or against collateral. If this is a new transaction, please attach the notarized contract to the inventory.

Line 8: Buildings and land

Describe the real estate owned by the adult or minor you represent. If a building is owned by more than one person, indicate the share (%) held by each. Indicate whether the value you are entering is the value from a certified appraiser or the municipal assessment. You must also include land that is free of construction in this section.

Line 9: Prearranged funeral contract (in the case of tutorship for an adult)

Enter the value of prearranged funeral services, if any, made on behalf of the represented person.

Line 10: Vehicles (automobile, ATV, motor home, boat, etc.)

Enter the current value of the vehicles owned by the person represented or the minor, along with the make and year of each.



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Line 11: Life insurance (cash surrender value only in the case of tutorship for an adult)

Enter the life insurance information for the person represented only if there is a cash surrender value.

Line 12: Furniture and personal effects valued over \$100

Describe the personal effects of the represented adult or minor that have a value of more than \$100. Furniture, jewelry, art, fur coats and expensive sports equipment fall into this category. If you believe that certain objects are very valuable, you can have them appraised by an expert.

Line 13: Other assets

Include any other debts that you were unable to enter in section 12. Give a brief description of each, including the current value.

It will be important to fill in lines 8 through 13 in future annual management accounts as long as the person you are protecting owns those assets.

Total assets

Add up the value of the assets listed in sections 1 to 13 inclusive.

5. LIABILITIES (DEBTS)

All amounts entered must be as of the date the file was opened.

Line 14: Bank loans (personal loans and lines of credit used)

Provide the name and address of the financial institution and list all outstanding balances (e.g., on a personal loan, car loan, credit card or line of credit used by the represented person).

Line 17: Mortgages payable

Enter all mortgage balances related to the buildings and/or land owned by the represented person.

Line 18: Other liabilities

Describe any other debts that you were unable to enter in items 14 and 17. Give a brief description of each, including the current value.

Total liabilities

Add up the value of the assets listed in items 14 to 18 inclusive.

Describe any contingencies that could change the value of the represented person's or minor's assets.

This section allows you to describe the assets in poor condition owned by the person you represent.

If you have other documents (endorsement of someone else's loan, current legal proceedings, etc.) that may affect the assets of the represented adult or minor, list them.

6. STATEMENTS, COPIES AND SIGNATURE(S) BY THE TUTOR(S)

Statements

This section also allows you to indicate the amounts that the person you represent owes you and the amounts you owe them, as well as to confirm your willingness to correct the inventory, should you become aware of other assets that do not appear on the list you have just made.

Copies

If you represent a person over the age of 18, you must give a copy of the inventory to his or her tutor to the person.

Signatures

You must sign the inventory form, have it signed by both witnesses and include the date.

Each copy of the inventory must be signed by the tutor(s) to property and the two witnesses.