

## Annual Management Report Checklist

Please check all boxes that apply.

<p>All supporting documents have been included:</p> <ul style="list-style-type: none"> <li>• Bank statements</li> <li>• Investment statements</li> </ul>	<input type="checkbox"/> <input type="checkbox"/>
<p>For the first annual management report only:</p> <ul style="list-style-type: none"> <li>• Account statements – loans</li> <li>• Account statements – credit cards and lines of credit</li> <li>• Earnings – cheque stubs or annual summary</li> <li>• Expenses – invoices (included)</li> <li>• Proof of renewal of security</li> </ul>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<p>The represented person's entire patrimony is listed.</p> <ul style="list-style-type: none"> <li>• Contact information for institutions where the represented person has bank accounts or certificates of deposit</li> </ul>	<input type="checkbox"/> <input type="checkbox"/>
<p>The represented person's debts are listed.</p> <ul style="list-style-type: none"> <li>• Bank loans (including lines of credit)</li> <li>• Mortgage payable</li> </ul>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<p>Income and expenses are presented on an annual basis and entered in the proper boxes.</p>	<input type="checkbox"/>
<p>If the tutor's remuneration is entered in box 202, it has been authorized by the court.</p>	<input type="checkbox"/>
<p>The amounts entered are accurate:</p> <ul style="list-style-type: none"> <li>• The amounts are entered under the proper headings.</li> <li>• The totals are correct.</li> </ul>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<p>All three copies are signed and dated.</p>	<input type="checkbox"/>
<p>The represented person has received a copy of the annual management report.</p>	<input type="checkbox"/>
<p>The tutorship council has received the annual management report.</p>	<input type="checkbox"/>
<p>The minutes of the meetings have been sent to the Curateur public (recommended, but not mandatory).</p>	<input type="checkbox"/>