

**Form 1: Referral to Public Trustee (*Personal Directives Act*)**  
**Regarding Finances of Person Requiring Continuing-Care or Home-Services Care**  
(subsection 8A(1) of Public Trustee Act)

I, \_\_\_\_\_  
(full name), am

Check one:

- the person in charge of \_\_\_\_\_, a continuing-care home, as defined in the *Personal Directives Act*, where the person who is the subject of this referral resides.
- the person in charge of \_\_\_\_\_, a provider of home-care services, as defined in the *Personal Directives Act*, to the person who is the subject of this referral.
- the person who made the decision to accept placement in a continuing-care home or regarding provision of home-care services for the person who is the subject of this referral under Section 14 of the *Personal Directives Act*.
- the delegate named in the personal directive of \_\_\_\_\_ (name of person who is the subject of the referral).

\_\_\_\_\_ (full name of person who is subject of referral) has been examined by \_\_\_\_\_ (full name and professional designation), a duly qualified medi[c]al practitioner and has been found to be not capable of managing their financial affairs.

- The written opinion of the duly qualified medical professional or prescribed health-care professional is attached.

I hereby advise you that circumstances are such that the Public Trustee should consider immediately assuming management of the financial affairs of \_\_\_\_\_ (full name of person who is subject of referral).

\_\_\_\_\_  
(date of signature)

\_\_\_\_\_  
(signature)

\_\_\_\_\_  
(witness's name – printed)

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

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**Notes:**

1) This form must be used by a person in charge of a continuing-care home, a home-care services provider or by a person making the decision to place a person in a continuing-care home or have home-care services provided for them.

(s. 8A(3) of *Public Trustee Act*)

2) This form must be accompanied by the written opinion of a duly qualified medical professional or prescribed health-care professional.

(s. 8A(2) of *Public Trustee Act*)

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