

Annual Report Checklist

All supporting documents have been included.	<input type="checkbox"/>
Bank statements including investments (assets)	<input type="checkbox"/>
Statements - loans	<input type="checkbox"/>
Statements – credit cards and line of credit	<input type="checkbox"/>
Income – check stubs or annual summary	<input type="checkbox"/>
Expenses – invoices (included)	<input type="checkbox"/>
Proof of renewal of security	<input type="checkbox"/>
List all the property owned by the person under your protection.	<input type="checkbox"/>
Contact details of the institutions where the protected person has bank accounts or deposit certificates	<input type="checkbox"/>
List all the debts of the person under your protection.	<input type="checkbox"/>
Bank loans (including line of credit)	<input type="checkbox"/>
Mortgage payable	<input type="checkbox"/>
Income and expenses are presented on an annual basis and entered in the proper boxes of the annual report form.	<input type="checkbox"/>
If the tutor's or curator's remuneration is entered in box 202, it has been authorized <u>by the court</u> .	<input type="checkbox"/>
The amounts entered are accurate.	<input type="checkbox"/>
The amounts are entered under the proper headings.	<input type="checkbox"/>
The totals are correct.	<input type="checkbox"/>
All three copies have been signed and dated.	<input type="checkbox"/>
The person under your protection has received a copy of the annual report (if the situation permits).	<input type="checkbox"/>
The secretary of the tutorship council has received the annual report.	<input type="checkbox"/>
The minutes of the meetings have been sent to the Curateur public with the annual report (recommended, not obligatory).	<input type="checkbox"/>