

Rapport sommaire de gestion

T-6

**BRIGHT
IDEAS**

BRIEF DESCRIPTION OF THE TOOL:

This document aims to help a private curator or anyone with a designated proxy to seamlessly manage the assets of their relatives. It is possible to include the dates of the beginning and end of a period of management. This management summary report, completed by the administrator, is produced in two copies: one for himself and the other for the beneficiary.

The administrator must fill in the different budget items which are divided into four sections: income, expenditure, assets and liabilities in connection with the finances of the person under management. Thus completed, the brief management account appears sufficiently detailed so that one can verify its accuracy and whether major changes occur from one period to another.

The administrator must sign the document before giving a copy to the beneficiary whose assets are being managed.

On the back of the document, there are sections of the Civil Code of Quebec and the Charter of Rights and Freedoms of Quebec that are relevant to the proxy.

Tool name	Rapport sommaire de gestion
Document type	Management framework
Type(s) of abuse	Financial
Intended for	Seniors, family
Issued by (organization)	Design: Charles-Roland Simard Endorsement : Table de concertation sur la violence, la négligence et les abus faits aux personnes âgées de Chicoutimi
City (region)	Chicoutimi
Creation date	2005
Number of people reached	Unknown
Contact person (contact information of the organization)	Table de concertation sur la violence, la négligence et les abus faits aux personnes âgées de Chicoutimi Centre d'Action bénévole de Chicoutimi - Monique Tremblay 605 St-Paul St. Chicoutimi, Quebec G7J 3Z4 Phone: 418 543-6639 Fax: 418 543-6918 Website: www.rc02.com/cabc AQDR Chicoutimi - Gabrielle Bouchard Phone: 418 543-8347 Website: www.aqdr.org
	Number of pages: 2
	How to get the tool: Get the help of a financial partner for the printing of the document



C