

Subject: Office of the Public Guardian and Trustee and Private Citizens Acting as Trustee

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#### BACKGROUND:

The Office of the Public Guardian and Trustee (OPGT) may be appointed as trustee under the *Adult Guardianship and Trusteeship Act (AGTA)* to manage the income and assets of AISH clients. The OPGT may also act as trustee of a trust of which an AISH client is a beneficiary.

Policy has been updated to clarify the circumstances under which the OPGT may be appointed as trustee and the treatment of assets in these circumstances.

Policy has also been updated to clarify the circumstances when a private individual may be appointed as trustee under the *AGTA*, or as trustee of a trust, and the treatment of assets in these circumstances.

#### INTENT:

To clarify the treatment of the assets of an AISH client in circumstances where the OPGT or a private citizen is acting as trustee.

#### POLICY:

The following program policy has been updated:

[Trusts](#)