

- To be completed as part of an **Application for Guardianship over the Property of a Minor (A Person under 18) under the *Children's Law Reform Act*.**
- You must complete a separate Schedule for each minor. You can renumber each Schedule A through Z accordingly.

Schedule " " to Judgment

1. This management plan is provided as part of the application made by:

Full name of applicant		
First Name	Middle Name	Last Name
Full name of applicant		
First Name	Middle Name	Last Name
Full name of applicant		
First Name	Middle Name	Last Name

Court File Number (if available) _____

to be appointed as guardian(s) of the property of the minor:

First Name	Middle Name	Last Name
Date of Birth (yyyy/mm/dd)		

2. Guardianship of Property

To the best of our knowledge and belief, the assets and income of :

the minor (Insert name of minor)	First Name	Last Name

to be covered by the Guardianship are: (state assets and income intended to be covered by the Guardianship below)

Property:

(Please list any additional properties on a separate page).

Nature of Property	Details	Value
Total		

3. Investment of assets and income under Guardianship

As guardians of property, we will monitor the market place and invest in the Canadian market, the United States market or the world market. We will invest as prudent investors pursuant to the *Trustee Act*, R.S.O. 1990, c. T.23, as amended, and specifically will consider the following criteria in planning the investment of trust property, in addition to any others that are relevant to the circumstances:

- a. General economic conditions.
- b. The possible effect of inflation or deflation.
- c. The expected tax consequences of investment decisions or strategies.
- d. The role that each investment or course of action plays within the overall trust portfolio.
- e. The expected total return from income and the appreciation of capital.
- f. Needs for liquidity, regularity of income and preservation or appreciation of capital.
- g. An asset's special relationship or special value, if any, to the purposes of the trust or to the beneficiary.

We will also diversify the investment of trust property to an extent that is appropriate to (a) the requirements of the trust and (b) general economic and investment market conditions

4. Use of Funds

By signing this form, I/we confirm that I/we will not require funds for the maintenance of

the minor: (Insert
name of minor)

First Name

Last Name

Details

We plan to invest, manage and maintain custody and control of all securities. Monies will not be disbursed from this account while

the minor: (Insert
name of minor)

First Name

Last Name

is a minor except for the payment of income tax and reasonable accounting fees for preparation of income tax returns.

5. Investment Plan

Explain below your plans for investments, taking into account the prudent investor criteria. Please list proposed investments, the particulars of such investments, and any fees, loads, or commissions associated with such investments. (Please list any additional investments on a separate page).

Proposed Investments	Proposed Investment Particulars	Fees, loads or commissions

State ranges for investments

	Minimum	Maximum
Cash	%	%
Fixed Income	%	%
Equities	%	%

Undertakings and Acknowledgement of Applicant(s)

☐ [I/We] acknowledge that [I/we] have prepared the above Plan/had it prepared and have read it and understand its contents.

☐ [I/We] shall abide by the terms of the Management Plan approved by the Court and, generally, in accordance with the provisions of the *Trustee Act*, R.S.O. 1990, c. T.23, as amended.

☐ [I/We] shall keep true and accurate records and accounts of all transactions, including investments, receipts and disbursements, and shall account for the Guardianship as required.

☐ [I/We] shall provide the Minor with education about financial management and investments before the Minor attains the age of 18 years.

***These terms are not intended to be used in Guardianship of Property Applications to manage a minor's personal injury award /settlement proceeds. Please see Form 2 Management Plan for personal injury proceeds.**

Name of Applicant 1	Signature	Date (mm/dd/yyyy)
Name of Applicant 2	Signature	Date (mm/dd/yyyy)
Name of Applicant 3	Signature	Date (mm/dd/yyyy)

Please complete a separate schedule for any additional Minor(s)