## Record-Keeping Form: Attorney for Property

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This is a form that an attorney for property can use to keep records in accordance with the Enduring Powers of Attorney Act in New Brunswick. Before you fill out this form, you should read the PLEIS-NB guide called Enduring Powers of Attorney: Being an Attorney.

Name $\qquad$

Address $\qquad$ City/Prov. $\qquad$
Postal Code $\qquad$ Tel. $\qquad$ Email

Date of enduring power of attorney $\qquad$
Date you began acting as an attorney for property $\qquad$
Name of grantor $\qquad$

## A. Property

Make a list of the grantor's property at the time you began acting as an attorney for property. Include both real property (land and buildings) and personal property (bank accounts, cash, RRSPs, investments, vehicles, valuables, etc.). If you don't know the value, enter an estimate.

| Property | Co-owner (if any) | Value |
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A. Property (continued)

| Property | Co-owner (if any) | Value |
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## B. Liabilities

Make a list of the grantor's debts and other liabilities at the time you began acting as an attorney for property (e.g., mortgage, line of credit, car loan, credit card debt). If you don't know the amount, enter an estimate.

Liability $\quad$ Amount

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## C. Income

Make a list of the grantor's sources of income (e.g., pension, annuities, investment income, Old Age Security, Canada Pension Plan). Enter the amount of the payments and the frequency of the payments (e.g., monthly).

## Source of income <br> Amount <br> Frequency

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## D. Gifts

Make a list of any gifts you have given on behalf of the grantor.
Note: You must not give gifts on behalf of the grantor unless the enduring power of attorney states that you may do so.

| Date | Gift |  | Amount/Value Recipient / Reason for gift |
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## E. Compensation

Make a list of any compensation you have paid to yourself, another attorney, or a monitor.
Note: You must not pay compensation to yourself, another attorney, or a monitor unless the enduring power of attorney states that you may do so.

| Date | Amount |  | Calculation |
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## F. Reimbursement

Make a list of any money you have paid to yourself or another attorney as reimbursement for expenses (e.g., postage, photocopying).

| Date | Description of expenses | Amount |  |
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