

## Information About a Representative

Complete this form if you represent a person alone or jointly in dealings with us and you are acting as:

- a liquidator of a succession;
- a curator of a person unable to administer their property;
- a tutor of a minor or a person unable to administer their property; or
- a mandatary, subject to the terms of a mandate (whether or not a protection mandate) or power of attorney, of a person who is either able or unable to administer their property.

The **only purpose** of this form is to provide us with information about the representative(s) and, if there is more than one representative (see Part 2), to designate a principal representative to whom we can send all **correspondence** addressed to the represented person. This form is not a mandate or a power of attorney. If the represented person wants to

authorize a representative to access their confidential information or documents or to access their file and act on their behalf in dealings with us, the person must complete form MR-69-V, *Authorization to Communicate Information or Power of Attorney*.

See page 3 for the documents to enclose with this form.

### Filing the form

Send the duly completed and signed form (and any additional copies) and any required documents to either of the following addresses:

- 3800, rue de Marly  
Québec (Québec) G1X 4A5
- C. P. 3000, succursale Place-Desjardins  
Montréal (Québec) H5B 1A4

Check this box if you are not the liquidator of a succession and want us to return any original documents or certified true copies you submit with this form.

### 1 Information about the person you are representing

Make sure you enter the ten-digit identification number from the represented person's notice of assessment.

Identification number .....	Last three digits of social insurance number (SIN) .....	Date of death (if applicable) ..... Y Y Y Y M M D D
Last name .....	First name .....	Date of birth ..... Y Y Y Y M M D D
Street number .....	Street name .....	Apartment .....
City, town or municipality .....	Province .....	Postal code .....
	Area code .....	Telephone .....

### 2 Information about the representative(s)

#### Representative capacity

Check the box corresponding to the capacity in which you and any other representatives are acting.

- |  |  |
|--|--|
| <input type="checkbox"/> Liquidator of a succession                                | <input type="checkbox"/> Curator   |
| <input type="checkbox"/> Mandatary of a person able to administer their property   | <input type="checkbox"/> Tutor of a minor child                                |
| <input type="checkbox"/> Mandatary of a person unable to administer their property | <input type="checkbox"/> Tutor of a person unable to administer their property |

Complete the applicable lines below depending on whether the representative is an individual or a business (for example, an accounting firm).

Total number of representatives .....

If you are not the only representative, enter the contact information of the representative to whom we should send all **correspondence** addressed to the person named in Part 1 under "Representative 1."

If there are more than three representatives, complete a separate copy of this form for the others. Make sure all the representatives or an authorized person signs Part 3.



**Representative 1**

Last three digits of SIN

Québec enterprise number (NEQ)

Business name

Name of individual or name of contact person, if the representative is a business

Last name

First name

Representative's address

Apartment number

Street number

Street name or P.O. box

City, town or municipality

Province

Postal code

Area code Phone

Area code Phone (work)

Extension

**Representative 2**

Last three digits of SIN

Québec enterprise number (NEQ)

Business name

Name of individual or name of contact person, if the representative is a business

Last name

First name

Representative's address

Apartment number

Street number

Street name or P.O. box

City, town or municipality

Province

Postal code

Area code Phone

Area code Phone (work)

Extension

**Representative 3**

Last three digits of SIN

Québec enterprise number (NEQ)

Business name

Name of individual or name of contact person, if the representative is a business

Last name

First name

Representative's address

Apartment number

Street number

Street name or P.O. box

City, town or municipality

Province

Postal code

Area code Phone

Area code Phone (work)

Extension



### 3 Signature of the representative(s)

Each representative listed in Part 2 must sign below. If the representative is a business, an authorized person must sign.

Name of the representative or authorized person (please print)	Signature	Date
<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>

### Documents to enclose

Enclose any document not yet submitted that establishes the capacity in which you and any other representatives are acting. You must also enclose the documents listed below depending on the capacity of each representative.

#### Liquidator of a succession

In all cases, enclose a copy of the following:

- proof of death of the represented person (act of death, death certificate or burial or cremation document);
- will search certificates issued by the Chambre des notaires du Québec and the Barreau du Québec;
- proof of the last will and testament, in the form of a complete and signed copy of one of the following:
  - a notarial will,
  - a holograph will (a handwritten will) or a will made in the presence of witnesses, accompanied by a certified copy of the judgment probating the will or the minutes of the probate,
  - a notarial codicil (modification to the last will),
  - a holograph codicil or a codicil made in the presence of witnesses, accompanied by a certified copy of the judgment probating the codicil or the minutes of the probate,
  - a marriage or civil union contract.

Also enclose any document designating the liquidator (such as form LM-14.1-V, *Designation of a Liquidator by the Heirs*) in the following cases:

- No testamentary documents were found.
- No liquidator has been designated.
- The designated liquidator will not or cannot fulfill their duties.

If a person designated as a liquidator of a succession has refused or is unable to act in such a capacity, has resigned from their duties or has died, submit a copy of a document to that effect. Also provide a document naming a new liquidator, if necessary.

Make sure the documents you send us are clear, legible and of good quality. Do not send the originals—they will not be returned to you. Keep them in case we ask for them.

#### Curator

Enclose a certified true copy of the judgment authorizing the representative to act as a curator.

#### Tutor

If the representative is the tutor:

- of a person of full age who is unable to administer their own property, enclose a certified copy of the judgment authorizing the representative to act as a tutor;
- of their child who is a minor, enclose a certified copy of the child's birth certificate showing the names of the parents;
- of a child who is a minor for whom the representative was appointed the tutor by the mother or father or by the court, enclose:
  - a certified copy of the judgment authorizing the representative to act as the tutor,
  - any other document (will, protection mandate, declaration filed with the Public Curator) appointing the representative as the tutor and, if applicable, a certified copy of the probate judgment or of the minutes of the probate (in the case of a holograph will or a will made in the presence of witnesses) or of the homologation by the court (in the case of a protection mandate).

#### Mandatory

If the representative is the mandatory:

- of a person who is unable to administer their own property, enclose the protection mandate for the represented person, accompanied by a certified true copy of the homologation by the court;
- of a person able to administer their own property, enclose an original or certified true copy of the power of attorney or mandate authorizing the representative to act in this capacity.

