



**THE BLOOM GROUP**

Community. Services. Together.

March 1, 2019

To: All Adult Guardianship Clients

Dear Valued Client:

**RE: Adult Guardianship Program 2019 Annual Fee Schedule**

Our Goal at The Bloom Group Adult Guardianship Program is to ensure that our clients will always have the best financial management services available, and we continuously work hard to achieve this goal. We focus on meeting and exceeding the needs of our clients in working to achieve their personalized financial goals. We strive to provide the highest level of quality and affordable service. In 2018, we embarked on a number of program wide upgrades to better service the needs of our clients with the goal of enhancing their financial health.

As a part of that effort, we recently reviewed our fee structure. Please find enclosed our 2019 fee structure and schedule, **effective April 1<sup>st</sup> 2019** for existing clients and new clients.

It is to be noted that the last fee change for AG Services was in April 2012. Also, included is a Q & A sheet that we hope answers any questions you might have about the changes.

After careful consideration of the needs of the Program as we grow, AG kept these increases to a minimum as to reduce the overall monthly impact to our clients. Our goal is to provide the best client experience at competitive pricing. We would like to emphasize that even after the fee structure change, our fees continues to be the lowest amongst others offering similar services in the sector. As a result of our direct partnership with Vancity we were able to negotiate a higher interest rate on balances held in your accounts essentially eliminating the increase in costs.

We thank you for your continued support. If you have any questions regarding this change or any other matters, please feel free to contact me or your Adult Guardianship Worker.

We appreciate the opportunity to serve you.

Sincerely,

Tyng-Wey Fan  
**Manager, Adult Guardianship Program**  
**The Bloom Group Community Service Society**

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The Bloom Group Community Services Society is a charitable, non-profit organization. Our charitable tax number is BN108021544RR0001.



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## **Adult Guardianship Program Fee Changes 2019**

### *Frequently Asked Questions:*

*Q: Do the fee changes impact all clients?*

**A: No. Changes effective from April 1<sup>st</sup>, 2019 are for clients who receive Pension Management and Pension Trustee services. Those receiving Discretionary Trusts and Power of Attorney Services are not impacted.**

*Q: Why is The Bloom Group changing fees?*

**A: The Bloom Group operates the Adult Guardianship Program on a cost recovery basis. Over the past 12 months the program has grown requiring the investment in increased staffing and infrastructure. The program is service based and is strictly self sustaining; thus, the fees are imperative to cover the operating expenses to provide the services.**

**All clients in the Program will be charged a monthly flat fee of \$50/Month.**

*Q: What happens if I do not agree to pay the new fees?*

**A: This notice is being sent out to all our clients in advance of the changes to provide as much notice as possible. If you have any questions please feel free to contact your Adult Guardianship Worker or the program manager, Tyng-Wey Fan.**

**We truly value your business in the AG Program and trust that our services provided restores a level of financial stability, be it through debt reduction, maintaining rental, utility, medical, and cable payments and ensuring that you have some monies left over to enjoy the things you deserve. The AG Program is here to serve you and ensure your financial health now and in the future.**

**We welcome your feedback to these changes and your feedback will be communicated to the Senior Management of The Bloom Group.**

**Our goal solely remains to provide the financial services for our clients at the most cost advantageous level.**

We thank you for your continued support of the Adult Guardianship Program. Please contact us if you have any further question.