BAO | Bereavement Authority of Ontario
5160 Yonge St., Suite 1200
North York, ON M2N 6L9
Tel: 647-483-2645 | Toll-free: 1-844-493-6356
Fax: 647-748-2645 | Email: info@thebao.ca

Application to Transfer Cemetery Care & Maintenance Fund or Account

Cemetery operators can now submit this application on the OBIS portal at:

https://portal.thebao.ca/

Please review the instructions in detail prior to completing this form. Detailed instructions for this form can be found at:

https://thebao.ca/for-professionals/cemeteries-crematoriums/forms/

This form must be completed by the cemetery operator for the purpose of seeking Registrar's consent to transfer a Care & Maintenance fund / account. Please note completion and submission of this form does not guarantee consent. Please ensure all the following documents have been submitted prior to applying to transfer.

Annual reporting documents:

- ALR Form 1 – Cemetery/Crematorium/Hydrolysis Operator
- ALR Form 2 - Report on the Care and Maintenance Trust Fund/Account

Additional items as applicable:

- Report on Prepaid Funds Form – Funeral/Cemetery/Crematorium/Hydrolysis
- Review Engagement / Audit Report

Checklist of document requirements for this application

- Trust Agreement (only required if transferring to a C&M Fund)
  - Ensure it is signed between the cemetery operator and the new trustee
  - Not required if the new trustee is a municipal trustee or the Public Guardian and Trustee
- Resolution from Board of Directors approving the transfer
  - This can be board minutes with authorized signature, or
  - A signed and dated resolution to transfer funds
- Most recent statement from current trustee
  - The most recent month is preferable, however if not available we will consider the more recent available statement

To locate your cemetery operator information, please utilize our Public Register:

- Public Register - Bereavement Authority of Ontario

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Cemetery Operator Information

Please enter only cemetery operator information and avoid entering cemetery site information

Cemetery Operator Name		Operator Licence Number
		OP-
Main Contact	**Position**	**Telephone Number**
Email Address		

Current Trustee or Financial Institution Information

If your have a C&M account and act as the trustee of your C&M money, please fill in your details

Trustee Name	Account Number	Latest Account Balance ($)
Main Contact at Financial Institution	**Position**	**Telephone Number**
Email Address		

Proposed New Trustee Information (Select only one):

Municipal Trustee ☐ | Ontario Public Guardian and Trustee ☐ | Other ☐

New Trustee		
Main Contact	**Position**	**Telephone Number**
Email Address		

I consent to the collection of this information as authorized under the Funeral, Burial and Cremation Services Act, 2002. I understand that this information will be used to determine whether I am and remain qualified to be licensed under the FBCSA.

I consent that I have read the instructions and ensured all required submissions and documents are submitted prior to my application.

I (we) certify that to the best of my (our) knowledge and belief the within statements are true and correct and are in agreement with the records maintained by the cemetery/crematorium operator.

Authorized Signature	Print Full Name	
Position	**Telephone Number**	**Date (dd/mm/yyyy)**

You may submit your form by email (preferred method) or by mail, or fax. Please contact the Financial Compliance department if you require aid.

Email Address: Trust@thebao.ca
Telephone Number: 647-483-2645
Fax Number: 647-748-2645

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