



DUTIES OF A GUARDIAN

The guardian must file two initial reports with the court within sixty days of their appointment, a Plan [of Care] and a Verified Inventory [of the Assets].

The Initial Plan is a listing of services the guardian plans to obtain and render to the ward. It includes a statement of where the ward will reside, how often the guardian will visit and a description of the ward's current abilities.

The Verified Inventory is a listing of all the ward's assets as well as an itemization of all regular income to be received. The inventory is verified with back-up documentation such as bank and brokerage statements, statements of property values, and appraisals of personal property.

After the review and acceptance of these initial reports by the court and the court-appointed attorney, the court will automatically discharge the attorney. However, the AIP's attorney may remain involved in the case, should the judge deem it necessary.

The guardian must also file annual reports, which are due no later than three months after the end of the guardianship's fiscal or calendar year.

The Annual Plan is an update to the Initial Plan. This plan must be accompanied by a written mental and medical evaluation from the ward's physician. It must also state whether the ward is eligible to have any rights restored.

The Annual Accounting itemizes all receipts and disbursements, as well as any increase or decrease in the value of the retained assets that occurred over the previous year. This accounting has to balance to the penny and supporting documentation must be available should the court request an audit.

All of these reports are signed under penalty of perjury by the guardian, reviewed by the attorney for the guardianship and then audited by the circuit court.



This list of required reports is simply the beginning of the guardian's responsibilities. In addition to these reports, the guardian of person must regularly visit the ward, assessing the need for any change in the person's residence, medical and personal care. The guardian must also evaluate the need for social and recreational services and any rehabilitation necessary to increase the ward's ability for self-determination.

The guardian of property must seek out the appropriate knowledge or professional advice to determine the best investments for the ward's cash and intangible assets. The guardian of property must also regularly check on any real property, assuring the appropriate repairs and maintenance are fulfilled any safeguard any other personal belongings.

Guardianships end for several different reasons:

- Death of the Ward
- Restoration of the Ward's rights
- Ward reaches the Age of Majority (18)
- A successor guardian is appointed

When the guardianship ends, the guardian is responsible for a final accounting to the court and must then turn over any remaining assets to the appropriate party.