

ANNUAL REPORT for Guardianships filed in Juvenile Court ONLY

1

(Forms and Instructions)

ANNUAL REPORT OF GUARDIAN FOR A MINOR (For Cases Filed in the Juvenile Court Only)

CHECKLIST

You may use the forms and instructions in this packet if the following factors apply to your situation:

- ✓ You have been appointed guardian for a minor, AND
- ✓ It is the yearly anniversary of the date you were appointed guardian, AND
- ✓ Your case number begins with “JG”, meaning it was filed in the Juvenile Court,

AND

- ✓ You need to file the Annual Report of Guardian (for a Minor).

- ✗ Do NOT use these forms if your case number begins with “PB”, which would mean:
 - the case was originally filed in the Probate Court,
 - your Annual Report must be filed with the Probate Court,
 - the procedures described in this packet do not apply, and
 - you need the packet for “Annual Report of Guardian for a Minor - Probate Court ONLY”

READ ME: Consulting a lawyer before filing documents with the court may help prevent unexpected results. A list of lawyers you may hire to advise you on handling your own case or to perform specific tasks, as well as a list of court-approved mediators can be found on the Law Library Resource Center website.

Annual Report of Guardian for a Minor

(For guardianships filed after October 18, 2004 – Juvenile Court ONLY)

This packet contains court forms and instructions to file an annual report of guardian for a minor. Items in **BOLD** are forms that you will need to file with the Court. Non-bold items are instructions or procedures. Do not copy or file those pages!

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The documents you have received are copyrighted by the Superior Court of Arizona in Maricopa County. You have permission to use them for any lawful purpose. These forms shall not be used to engage in the unauthorized practice of law. The Court assumes no responsibility and accepts no liability for actions taken by users of these documents, including reliance on their contents. The documents are under continual revision and are current only for the day they were received. It is strongly recommended that you verify on a regular basis that you have the most current documents.

Instructions: How to fill out the Annual Report of Guardian

You may use this packet if you have been appointed as the Guardian for a Minor (Child), and it has been a year since your appointment. You must complete this form every year you are the Guardian for the Child on or before the anniversary date of your appointment as Guardian.

Fill in the information requested about you, the Guardian, at the top, left corner of the form, and then the case caption information (name of the Child and the case number). Next, write in the date this report is due, which should be the anniversary date of when you were first appointed. Finally, write in the beginning and ending dates of the time period for which you are filing this report, which would generally be from the day after the previous year's anniversary date to the due date (this year's anniversary date). Now match the numbered instruction (below) to the numbered line on the form.

1. Write in the information requested about the Child.
2. Describe where the Child lives (not the address). Things to include would be:
 - Whether a private home, a boarding home or school;
 - How many people live in the Child's room;
 - Who looks after the Child; AND
 - The name of the person in charge; or
 - The name of the place where the Child lives;
 - The address and the telephone number.
3. Write in the information requested about the Child's current doctor.
4. Provide the information requested about the Child's physical and mental health. You must also file a current copy of the doctor's or nurse's report about the Child's current physical and mental health. Since a medical report is considered confidential under the Court Rules, you must follow the process for filing confidential records. See the procedure: Special Handling for Confidential Documents.
5. Provide the Information requested about the Child's Education: name of school, etc.
6. Answer the questions regarding how many times you saw the Child over the past year and when you last saw him or her. If the Child lives with you, you may simply state "Lives with me" and "Every day" or "Nearly every day" or whatever is true for your situation.

Then tell the Judge/Commissioner whether you think the guardianship should continue and the reasons it should or should not continue.

7. Write in the name, address, and telephone number of the person responsible for the Child's assets. If the Child does not have any assets, then write in N/A for "not applicable".
8. IF the Child receives any state, county, or federal agency services, write in the name of the agency contact and describe the services received by the Child. If the Child does not receive any services, write in N/A for "not applicable".

9. Answer the question about the age of the Child. If you answered “Yes” to this question, then Answer the next question about whether you believe the Child will need a guardian after the age of eighteen.
10. Mailing affidavit. Write the names and addresses of the people to whom you mail a copy of the Annual Report and the date you mail them. This includes both parents, and any children who are age 14 or older (even if they live with you).
11. Sign and print your name to show that you mailed the document.
12. File the original Annual Report and doctor’ reports. Mail filed copies to the parties you stated you mailed to.

Do not copy
or file this page

Special Handling For

Confidential Documents*

Each “confidential document” and each copy of the confidential document must be submitted to the Clerk of Superior Court in its own, *un*-sealed (9”x12”) envelope.* The following documents are considered to be “confidential:”

- Probate Information Forms
- Medical Reports and Records
- Budgets
- Inventories and Appraisements
- Accountings
- Credit Reports
- Any other document ordered by the court to be “Confidential”

*A separate envelope is required for *each* confidential document, as well as each copy of the confidential document. The following information must appear on the outside of each envelope:

1. Case name and number (“In the Matter of xxxxx” and “PB 2020-xxxxx”),
2. Name of the document (“Annual Accounting,” “Annual Report,” “Medical Records,” etc.)
3. Name of the party filing the document, and
4. The words “Confidential Document”

“Confidential Information” in *Non*-Confidential Documents*

Documents not labeled and submitted as “Confidential” must not contain “confidential information.”

“Confidential information” is any of the following:*

- The Social Security Number of a living person
- Any financial account number (including those for credit card, bank, and brokerage accounts; insurance policies and annuity contracts; and pension, profit-sharing, or retirement accounts) *unless only the last 4 digits are displayed*
- Any other information determined by the court to be “Confidential”

On its own, or on the request of any party, the court may order that:

1. A document containing confidential information be filed as “a confidential document,”
or
2. Confidential information contained in a non-confidential document be *redacted* (covered up or hidden).

Filing confidential information in a non-confidential document is prohibited. The court may impose appropriate sanctions on a person who violates the confidentiality rules.

*Rule 8, Arizona Rules of Probate Procedure

Person Filing: _____
Address (if not protected): _____
City, State, Zip Code: _____
Telephone: _____
Email Address _____
Lawyer's Bar Number: _____

FOR CLERKS USE ONLY

Representing Self, without a Lawyer or Attorney for Petitioner OR Respondent

SUPERIOR COURT OF ARIZONA IN MARICOPA COUNTY

In the Matter of Guardianship of: _____ Case Number JG

_____ A Minor

ANNUAL REPORT OF GUARDIAN

PERIOD FROM _____ TO _____ DUE: _____
 MO DAY YR MO DAY YR MO DAY YR

Instructions to Guardian: Arizona law (A.R.S. 14-5315) and Arizona Rules of Probate Procedure Rule 46 requires every guardian to submit a report to the Court each year regarding the children. Please complete this report and file with the Court on or before the ordered due date. When complete, mail the report to:

Clerk of Superior Court, Juvenile Division
3131 W. Durango St., Phoenix, Arizona 85009
OR 1810 S. Lewis St., Mesa, Arizona 85210

You must also mail a copy of the report to anyone else entitled to notice, including the parents and children if he or she is at least 14 years old, even if he or she resides with you. Fill out the Affidavit of Mailing at the end of the report to show the names and addresses of all the people to whom you mail the report and the date on which you mail it.

REMINDER: YOU MUST FILE A SEPARATE DOCTOR'S RECORD, REPORT OR LETTER THAT THE CHILDREN HAVE BEEN SEEN BY A DOCTOR WITHIN THE ONE-YEAR REVIEW PERIOD.

I am the Guardian and I make these statements to the Court under penalty of perjury:

1. Information about the Children.

Children's Names: _____

Street Address: _____

City, State, Zip _____

Code: _____

Telephone: _____ Date(s) of Birth: _____

(month, day, year)

2. Information about where the Children live.

A. Describe where the Children live (private home, boarding school, etc.)

B. Provide the information requested below about the home or facility.

Name of Person in Charge or Facility: _____
Name of Facility: _____
Street Address: _____
City, State, Zip Code): _____
Telephone Number(s): _____

3. Information about the Children's Doctor.

Current Doctor (Name): _____
Doctor's Address: _____
Doctor's Telephone Number: _____

4. Information about the Children's physical and mental health.

A. Date the Children were last seen by a doctor: _____

B. Changes in Children's health. Have there been any major changes in the Children's physical and/or mental condition in the last year? If so, please describe the change.

C. A copy of the confidential medical report or letter from a doctor of registered nurse must be filed.

I attached the confidential medical report in a specially-marked confidential envelope.

5. Information about the Children's Education.

a. Name of School District: _____

b. Name/Address of School: _____

c. Last Grade Completed: _____

d. Describe Children's School Experience (grades, relationships, behavior):

6. Information from the Guardian.

How many times have you, the Guardian, seen the Children in the last 12 months? _____

What was the date of the last visit? _____

What is your opinion about whether the guardianship should continue? (Explain.)

7. Information about the Children's assets:

- A. Do the Children have assets greater than \$10,000? Yes No
- B. IF YES, has a conservatorship been ordered as required by A.R.S §14-5401 Yes No

8. Information about State, County or Federal Agency Services: Do the Children receive any state, county or federal agency services? If so, write in the name of the agency contact and describe the services received by the Children.

9. Information about Child's Age and Guardianship After Age of 18:

Will the Child reach the age of 18 within the next twelve months? YES NO

Is the Child disabled or incapacitated to the extent that he or she will need a guardian after reaching the age of 18?

- YES. I believe the Child will need a guardian after the age of 18.
- NO. I do not believe the Child will need a guardian after the age of 18.

10. AFFIDAVIT OF MAILING: I have mailed or will mail this Annual Report of Guardian to the following people at the following address(es) on this date: _____

(Month/Day/Year)

Name: _____

Address: _____

City State, Zip Code: _____

Name: _____

Address: _____

City State, Zip Code: _____

Name: _____

Address: _____

City State, Zip Code: _____

Name: _____

Address: _____

City State, Zip Code: _____

UNDER PENALTY OF PERJURY: I declare to the Court that the information I have provided in this document is true and correct to the best of my knowledge and belief.

DATED: _____

Signature of Guardian

PRINTED Name of Guardian