

## SELF-SERVICE CENTER

# INSTRUCTIONS: HOW TO FILL OUT THE ANNUAL REPORT form for THE GUARDIANSHIP

**USE THIS FORM** if you have been appointed as the Guardian/Conservator for the Ward, and it has been at least 9 months since your appointment. You must complete this form **every year** you are the Guardian for the Ward. Please follow the appropriate Annual Report due dates:

1. The guardian's **first Annual Report shall cover the time** from the date the guardian's **letters of appointment** were first issued **through and including the last day of the ninth month** after the date the guardian's permanent letters were issued (unless otherwise ordered by the Court). File the Annual Report with the court on or before the anniversary date of the issuance of the guardian's permanent letters of appointment.
2. All subsequent Annual Reports of guardian **shall cover the time from the ending date of the most recent previously filed Annual Report** of guardian **through and including the last date of the twelfth month thereafter** (unless otherwise ordered by the court). The report shall be filed with the court on or before the anniversary date of the issuance of the guardian's permanent letters.
3. If the guardian is unable to file an Annual Report of guardian within the time set forth in this rule, the guardian shall, before the deadline, file a motion that requests additional time to file the report. The motion shall state why additional time is required and how much additional time is required to file the report.
4. For purposes of this rule (Rule 30(c), Arizona Rules of Probate Procedure) if the guardian's appointment initially was temporary, "the date the guardian's letters were first issued" shall mean the date the guardian's temporary letters were issued; otherwise, "the date the guardian's letters were first issued" shall mean the date the guardian's permanent letters were issued.

## Follow these steps to complete this Annual Report form:

**STEP 1** Complete this ANNUAL REPORT using **Black Ink Only**.

**Top of Page:** Fill in your name, address, telephone, and other information about the guardianship, including the DATE the Annual Report is due.

**Paragraph 1: REPORTING PERIOD:** Write the following information:

- The date your reporting period begins, and
- The date your reporting period ends.

**Paragraph 2: About the WARD:** Complete the following:

- The Name of the Ward (the person you are the Guardian for),
- The Ward's date of birth, address, and telephone number

**Paragraph 3: LIVING SITUATION:** Complete the following:

- Describe the setting where the Ward lives (not the address). Things to include would be whether it is a private home, boarding home, or nursing home. How many people live in the Ward's room? Who looks after the Ward, and so forth, **AND**
- The name of the person in charge of the residence, the name of the place where the Ward lives, the address, and the telephone number and the e-mail address of the residence.
- Write in the full address of the place the ward can usually be found Mondays through Fridays.

**Paragraph 4: PHYSICIANS AND SPECIALISTS.** *Note:* This section contains **CONFIDENTIAL INFORMATION thus, SPECIAL HANDLING is REQUIRED:** Write in the Ward's current doctor, the doctor's address and telephone number.

- Also, if the ward has other doctors or specialists, write in the appropriate facts.

**Paragraph 5: PHYSICAL and MENTAL HEALTH.** *Note:* This section contains **CONFIDENTIAL INFORMATION thus, SPECIAL HANDLING is REQUIRED.** Give the following information about the Ward's physical and mental health:

- Write in the date the Ward was last seen by a doctor,
- Describe any changes in the Ward's health, **AND**
- Make sure you attach a current copy of the doctor's report about condition of the Ward's current physical and mental health.

**Paragraph 6: Information about the Ward's Guardian.** This is information about **you**. Give your name, address, and telephone number and e-mail address.

**Paragraph 7: GUARDIANSHIP STATUS.** Information about the Guardianship.

- Write in the number of times you have seen the Ward in the last 12 months, and the date of your last visit.
- Then tell the Judge/Commissioner whether or not you think the guardianship should continue and the reasons it should or should not continue.

**Paragraph 8: ASSET MANAGEMENT.** Information about the person responsible for the Ward's assets.

- Write in the name, address, and telephone number, and e-mail address of the person responsible for the Ward's assets. If the Ward does not have any assets, then write in N/A for not applicable.

**Paragraph 9: BENEFITS RECEIVED.**

- If the Ward receives any local, state, county or federal agency benefits, write in the name of the agency.
- If a person from the above agency coordinates the benefits with the ward, write in the name of that person or caseworker.
- In the last column, describe the kind of benefit(s) the Ward receives. If the Ward does not receive any benefits, write in **no**.

**Paragraph 10: SERVICES RECEIVED.**

- If the Ward receives any local, state, county or federal agency services, write in the name of the agency.
- If a person from the above agency coordinates the services with the ward, write in the name of that person or caseworker.
- In the last column, describe the kind of service(s) the Ward receives. If the Ward does not receive any services, write in **no**.

**Paragraph 11: MAILING DECLARATION**

- Write the names and addresses of the people to whom you mailed a **copy** of this ANNUAL REPORT and the date you mailed them. Then sign your name to show that you mailed the document.

**Signature:** Make sure you sign and print your name, AND date the document.

## **STEP 2**

Read the Self-Service Center packet **Procedures: How to File the Annual Report of the Guardian.**