

GUARDIANSHIP

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Annual Report of Guardian

Following the Court Hearing: The Court Papers
(Instructions Packet)

SELF SERVICE CENTER
GUARDIANSHIPS AND CONSERVATORSHIP
ANNUAL REPORT OF GUARDIAN

PART 1: The Instructions

How to assemble these documents

This packet contains general information and instructions for the annual report of guardian. Be sure the documents are in the following order:

Order	File Number	Title	No. Pp.
1	PBGCG9it	Table of instructions in this packet	1
2	PBGCG90p	Procedures: How to File the Annual Report of the Guardian	2
3	PBGCG92i	Instructions: How to Fill Out the Annual Report of the Guardian	1

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PROCEDURES: HOW TO FILE THE ANNUAL REPORT OF THE GUARDIAN

USE THIS PACKET if you have been appointed as the guardian for a protected or incapacitated person, the "Ward", and **it has been a year since your appointment.**

WHEN AND HOW TO FILE THE ANNUAL REPORT:

- STEP 1** The guardian for the Ward must complete the ANNUAL REPORT **every year, on or before the anniversary date** of the letters of appointment as guardian for the Ward.
- STEP 2** Complete the ANNUAL REPORT in **black ink**. Answer all of the questions. After you have completed the ANNUAL REPORT, you can file or mail the ANNUAL REPORT to the Court.
- STEP 3** Mail a **copy** of the ANNUAL REPORT to the following people:
- The Ward
 - The Ward's Conservator (if applicable)
 - The Ward's spouse or the Ward's parents if the Ward is not married and has at least one living parent
 - The Court appointed lawyer for the Ward (if applicable)
 - Any other interested person who has filed a demand for notice with the Court.
- Keep a copy** of the ANNUAL REPORT for yourself with a list of the people to whom you mailed the ANNUAL REPORT.

- STEP 4** File the **original** ANNUAL REPORT with the Court through the following:
- **In person:** File the **original** ANNUAL REPORT with the Clerk of the Court, 125 West Washington, 1st Floor, Phoenix, Arizona, or at 18380 N. 40th St., Phoenix, or at 222 East Javelina, 1st Floor, Mesa, Arizona or at 14264 W. Tierra Buena Lane in Surprise. Bring a copy of the Annual Report with you to have it conformed, **OR**
 - **By mail:** Mail the **original and one copy** of the completed and signed ANNUAL REPORT along with a self-addressed, stamped return envelope to:

Clerk of the Court - Probate Department
Superior Court of Arizona in Maricopa County
125 West Washington
Phoenix, Arizona 85003

- Request that a copy of the ANNUAL REPORT be conformed and mailed back to you. This will assure that your file contains a copy of the ANNUAL REPORT reflecting the date it was filed with the Probate Court Clerk.

CHANGE OF ADDRESS:

STEP 5 FIDUCIARY/GUARDIAN'S CHANGE OF ADDRESS. If you have been appointed as a guardian or Fiduciary, you must list your address in the initial Petition and you must **within 10 days** notify Probate/Mental Health Court Administration in writing if your mailing address changes **anytime** during the term of your appointment. Your notice of change of address must contain the case number(s) of the case(s) in which you have been appointed.

STEP 6 WARD'S CHANGE OF ADDRESS. If you have been appointed as a guardian or Fiduciary, you must notify the Probate/Mental Health Court Administration in writing within **3 days** of the change in address of a Ward or Protected Person. The Notice must contain the case number and the Ward's or Protected Person's new address. All written Notices may be delivered personally or can be mailed to the Court at the address given above.

Note: A Fiduciary or guardian who fails to notify the Court of a change in address will be required to pay **all costs** resulting from any failure to notify the Court of the address change.

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INSTRUCTIONS: HOW TO FILL OUT THE ANNUAL REPORT OF THE GUARDIAN

USE THIS PACKET if you have been appointed as the Guardian for the Ward, and it has been a year since your appointment. You must complete this form every year you are the Guardian for the Ward on or before the anniversary date of your *letters of appointment* as Guardian. Follow these steps to complete this form:

STEP 1 Complete the ANNUAL REPORT OF GUARDIAN. Use **Black Ink Only!!!**

Paragraph 1: Write the following information:

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

Paragraph 2: Complete the following:

- Describe where the Ward lives (not the address). Things to include would be whether it was 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 or the name of the place where the Ward lives, the address, and the telephone number.

Paragraph 3: Write in the Ward's current doctor, the doctor's address and telephone number.

Paragraph 4: **CONFIDENTIAL INFORMATION: SPECIAL HANDLING 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 the Ward's current physical and mental health.

Paragraph 5: Information about the Ward's Guardian. This is information about **you**. Give your name, address, and telephone number.

Paragraph 6: 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 7: Information about the person responsible for the Ward's assets.

- Write in the name, address, and telephone number 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 8: Information about State, County, Federal Agency Services.

- If the Ward receives any state, county, or federal agency services, write in the name of the agency, and describe the services the Ward receives. If the Ward does not receive any services, write in **no**.

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

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

STEP 2 Read the Self-Service Center packet **Procedures: How to File the Annual Report of the Guardian.**