SELF-SERVICE CENTER

PROCEDURES: HOW TO FILE THE ANNUAL REPORT OF GUARDIAN

The guardian for the Ward, the protected or incapacitated person, must file an **Annual Report** every year, **on or before the anniversary of the date** the **Letters of Appointment were issued.**

- The ***first*** report should cover the time period from date the **Letters of Appointment** were issued through the last day of the ninth (9th) month after.
- The report for **each year after** the first should cover the next 12 month period, and be filed on or before the anniversary of the date of the Letters of Appointment.

STEP 1 **COMPLETE THE ANNUAL REPORT,** form **PBGCG92f, in BLACK INK.** Read carefully. Provide all information requested. Write "N/A" if not applicable. After you have completed the Report, you may either mail or personally deliver it to the Court.

STEP 2 **Mail a copy of the ANNUAL REPORT to the people listed on the Declaration of Mailing** (at the end of the Report form)**,** *which should include:*

- 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 a copy.

STEP 3 **FILE THE ORIGINAL ANNUAL REPORT WITH THE COURT:**

- **IN PERSON**: File the **original ANNUAL REPORT** with the **Clerk of the Court** at any of the following locations:

125 West Washington Street, 1st Floor, Phoenix, AZ
14264 W. Tierra Buena Lane, Surprise, AZ
18380 N. 40th St., (40th Street & Union Hills) **Phoenix**
222 East Javelina Drive, 1st Floor, Mesa, AZ

*Bring a copy to have stamped by the Clerk to keep for **your** records!*

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
  125 West Washington
  Phoenix, Arizona 85003

- Request that a copy of the **ANNUAL REPORT** be stamped by the Clerk and mailed back to you so that ***your*** copy shows the date it was filed with the Court.

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NOTICE: If the guardian is unable to file an annual report of guardian on or before the anniversary of the date of the **Letters of Appointment**, the guardian must file a motion to request additional time to file the report. The motion must state ***why*** additional time is needed and **how much** additional time is required to file the report.

REMINDER: REPORT CHANGES TO THE COURT

FIDUCIARY/GUARDIAN'S CHANGE OF ADDRESS (or NAME): If the guardian or fiduciary's mailing address or legal name changes anytime during the term of the appointment, you must notify Court Administration in writing **within 10 days** of the change. The notice must contain the case numbers of all cases in which you have been appointed.

WARD'S CHANGE OF ADDRESS: If the Ward/Protected Person's address changes, you, as a guardian or fiduciary, must notify Court Administration in writing **within 3 days** of the change. The notice must contain the case number and the Ward's new address.

DEATH OF THE WARD: If the Ward dies, you, as guardian or other fiduciary must notify Court Administration in writing within **10 days** of learning of the death of the protected person (Note that you must also petition the court to terminate the case and be discharged from your duties).

Notice may be delivered personally to the Court or mailed to the address for the Probate Clerk of Court listed on the previous page.

A fiduciary or guardian who fails to notify the Court may be required to pay **any costs** resulting from any failure to notify the Court of the change.

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