

GUARDIANSHIP OF _____
 GUARDIAN(S) _____
 DATE ESTABLISHED _____

<u>ITEM</u>	<u>DATE</u>	<u>DATE</u>	<u>DUE</u>
<u>COMPLETED/FILED</u>			
Confirm representation agreement is signed	_____	_____	
If lawsuit obtain letter of Protection	_____	_____	
Filing fee paid	_____	_____	
1. Affidavit of Insolvency (mental health & probate)	_____	_____	
2. Attorney's Affidavit (mental health & probate) (indigent)	_____	_____	
3. Financial Affidavit signed by Guardian	_____	_____	
4. Pet. Determine Incapacity	_____	_____	
5. Pet. Appt. Guardian (PetLimitedGdnPP) (PetPlenaryGdnPerson) (PetPlenaryGdnPP)	_____	_____	
6. Oath of Guardian, Designation Resident Agent (OathGuardian)	_____	_____	
7. Application of Guardian (use Hills. Cty form)	_____	_____	
8. Notice of Filing Gdn DOB & SS#	_____	_____	
9. Ward Information sheet for incapacity	_____	_____	
10. Fingerprints Or credit report	_____	_____	
11. Order Appointing Guardian (OrderAppointLtdGdnPerson)	_____	_____	(OrderAppointLtdGdnPP)
(OrderAppointPlenaryCoGdnPP) (OrderAppointPlenaryGdnPerson) (OrderAppointPlenaryGdnProperty)	_____	_____	(OrderAppointPlenaryGdnPP)
12. Order Determining Incapacity (OrderDetermineIncapacity-Limited) (OrderDetermineIncapacity-Total)	_____	_____	
13. Letters of Guardianship (LettersLtdGdnPerson) (LettersLtdGdnPersonProperty) (LettersLtdGdnProperty) (LettersPlenaryCoGdnPerson) (LettersPlenaryCoGdnPP) (LettersPlenaryGdnPerson) (LettersPlenaryGdnPP) (LettersPlenaryGdnProperty) (lettersVoluntaryGdnshp)	_____	_____	
14. Call Client to confirm Court Appearance	_____	_____	
DATE LETTERS ISSUED			
15. Create Dates due in PC Law per Ct Order For initial and annual reports.	_____	_____	
16. Send guardian letter about upcoming duties (LetterToCllient-duties)	_____	_____	
17. Prepare Inventory of Guardian	_____	_____	
18. Petition to Reimburse Petitioner Order Auth. Reimbursement	_____	_____	
19. Petition for Order Waiving Education Requirement Order Waiving Education Rqmt.	_____	_____	

Checklist - Adult Guardianship

ITEM	DATE	DATE	DUE
<u>COMPLETED/FILED</u>			
20. File Certificate of Guardian Education Course	_____	_____	
21. Draft Pet. Designate Depository	_____	_____	
**IF MARRIED PUT ACCOUNT I/T/F SPOUSE			
(PetDesignateDepository-Comerica)			
Draft Depository's Acceptance	_____	_____	
Order Designating Depository	_____	_____	
(OrderDesignateDepository-Comerica)			
File Depository's Receipt of Assets	_____	_____	
22. Draft letter to Depository	_____	_____	
(LetterToDesignatedDepository)			
23. Pet. Waive Depository Account	_____	_____	
(indigent ward)			
Order Waiving Depository	_____	_____	
24. Draft Pet. Pay Monthly Expenses	_____	_____	
(PetMonthlyBudget)			
Order Auth. Payment Mo. Expenses	_____	_____	
25. File Pet. Simplified Accounting	_____	_____	
Order Granting Simplified Accounting	_____	_____	
(90 days from adjudication)			
26. Draft Pet. Pre-Need Funeral Exp.	_____	_____	
(PetitionFuneral-Preneed)			
Order Auth. Pre-Need Funeral	_____	_____	
(OrderFuneral-Preneed)			
27. Draft letter to bank re.: pre-need	_____	_____	
(LetterToBank-PayCourtOrder)			
28. Apply for Homestead Tax Exemption	_____	_____	
29. Review Ward's Income/Intangible Tax Returns	_____	_____	
30. Guardian to Engage CPA	_____	_____	
31. Pet. Auth. Payment Guardian Fees & Expenses	_____	_____	
Order Auth. Payment Guardian	_____	_____	
32. Pay Examining Committee and Court Appointed Attorney	_____	_____	
33. Prepare & File Affidavit of Payment concerning	_____	_____	
Examining Committee & Court Appointed Attorney	_____	_____	
