

Duties and Responsibilities of the Guardian

Guardianship of Estate

Do

- File your **Inventory** within three (3) months of your appointment.
- File your first **Account** within twelve (12) months of your appointment and every year thereafter.
- Hold funds of the ward in a **fiduciary account** in the name of the guardian as guardian, for the benefit of the ward. Itemize receipts of the guardianship and submit paid receipts, vouchers, or canceled checks of all distributions.
- Maintain **good records**.
- Obtain court authorization before withdrawing or transferring the ward's funds in the fiduciary's account. This is done by filing an **Application to Release Funds to Guardian** (Form No. 15.6).
- Obtain court authorization to expend the ward's funds out of the fiduciary account. This is done by filing an **Application for Authority to Expend Funds** (Form No. 15.7). Please list the nature and specific amount of the expenditure.
- Obtain court approval before **relocating** the ward.
- Notify the guardianship attorney and the court if there is a **Change of Address** for you, the ward, or the next of kin.
- Apply for and receive court approval before paying **attorney fees**.
- File your **Final Account** within thirty (30) days of the termination of the guardianship.

Guardianship of Person

Do

- File your **Guardian's Report** within twelve (12) months of your appointment and every year thereafter.
- If the ward is an adult, file the **Statement of Expert Evaluation** within twelve (12) months of your appointment and every year thereafter.
- Obtain court approval before **relocating** the ward.
- Notify the guardianship attorney and the court if there is a **Change of Address** for you, the ward, or the next of kin.
- Apply for and receive court approval before paying **attorney fees**.

Don't

- Disregard your ward's feelings or thoughts.
- Combine your money with your ward's money. **You cannot commingle your ward's funds with your own.**
- Sell your ward's property without an appraisal and court approval.

Additional Tips

- Keep a copy of your Letters of Guardianship on hand when acting as Guardian for your ward.
- For good cause shown, the Court may grant an extension of time to file your inventory or account.
- If you timely perform your duties and obtain waivers of notice and consents, you will expedite the guardianship proceedings and reduce court costs.
- You are eligible for guardian compensation if you faithfully and diligently perform your duties after application and approval from the court.
- Your authority to act as Guardian ends upon the death of the ward.