

Guardian Fee Petition Checklist

Date Petition filed: _____ Division: _____

Ward: _____ Case No. _____

Type of Guardianship: Person Person and Property Property
 Plenary Limited Minor Voluntary VA

Attorney: _____ Guardian: _____

Date Guardian Appointed: _____

Successor Guardian? Yes No

Total Assets from last Accounting: \$ _____

● Amount of total that is cash \$ _____

● Amount of total that is real estate \$ _____

A. Fees from Last Two Billing Periods:

1. _____ to _____

● Amount requested (fees & costs) \$ _____

● Amount awarded (fees & costs) \$ _____

2. _____ to _____

● Amount requested (fees & costs) \$ _____

● Amount awarded (fees & costs) \$ _____

B. Total of all fees awarded to date \$ _____

CURRENT Billing Period (this petition) _____ to _____

● Guardian Rate \$ _____/hr. ● # of hours in petition: _____

● Guardian Fee Request: \$ _____

● Guardian Costs Request: \$ _____

● Total Request: \$ _____

- Notice and certificate of service given to:
 - Attorney Yes No N/A
 - Ward, if limited or voluntary Yes No N/A
 - Interested parties Yes No N/A

- If voluntary or VA, consent filed? Yes No N/A
- Objections filed? Yes No N/A

- ◇ Bill-paying activity:
 - Does any month exceed the 2 hour maximum cap? Yes No N/A
 - If yes, is there a justified explanation provided? Yes No N/A

- ◇ Shopping related activity for the ward:
 - Does any month exceed the respective cap? Yes No N/A
(2.5 hours/mo. Ward at home; 1.0 hour/mo. Ward at facility)
 - If yes, is there a justified explanation provided? Yes No N/A

- ◇ Clerical activity, such as copying/faxing/filing:
 - Does any month exceed the 1 hour maximum cap? Yes No N/A
 - If yes, is there a justified explanation provided? Yes No N/A

A. Timeliness of Filing Reports this year (to commence July 1, 2006)

- ◇ Initial / Annual Plan filed timely this year (for time period in Petition)? Yes No
 - If no, date it was due? _____ • Date filed: _____
 - If no, was a petition for extension of time filed prior to due date? Yes No

- ◇ Inventory / Accounting filed timely this year (for time period in Petition)? Yes No
 - If no, date it was due? _____ • Date filed: _____
 - If no, was a petition for extension of time filed prior to due date? Yes No

B. Timeliness of Filing Previous Reports (two previous reporting periods)

1. Initial / Annual Plan for prior reporting period timely filed? Yes No N/A
 - If no, date it was due? _____ • Date filed: _____

- Inventory / Accounting for prior reporting period timely filed? Yes No N/A
 - If no, date it was due? _____ • Date filed: _____

2. Initial / Annual Plan for 2nd prior reporting period timely filed? Yes No N/A
 - If no, date it was due? _____ • Date filed: _____

- Inventory / Accounting for 2nd prior reporting period timely filed? Yes No N/A
 - If no, date it was due? _____ • Date filed: _____

◇ Orders to File on most recent annual reports for non-compliance or other problems? Yes No

◇ Most recent Inventory / Annual Accounting approved? Yes No

■ If no, date of court order disapproving: _____

■ Was report corrected? Yes No •Date: _____

◇ Most recent Initial / Annual plan approved? Yes No

■ If no, date of court order disapproving: _____

■ Was report corrected? Yes No •Date: _____

◇ Case Management Conference / Status / OSC set on most recent annual reports for non-compliance or other problems? Yes No

◇ Orders Disapproving/Compelling Compliance on most recent annual reports for non-compliance or other problems? Yes No

■ Was disapproval due to failure to provide specific statutorily required information or attachments (such as bank statements to accounting or doctor statement to plan)? Yes No

■ Was disapproval entered due to clarification and/or further explanation needed regarding certain entries? Yes No

Comments: Examples of common issues: 1. Mileage does not match with time charged
2. Description does not match the time billed. 3. There is no coding, as required for shopping, clerical and bill pay. 4. The descriptions are too brief to determine benefit to ward. 5. There are multiple visits or long visits to the ward, without explanation. 6. Billing for person-related functions when guardian of property only (or vice versa). 7. Some entries should have been combined to bill as actual time.

Recommendations to the Court based on Discrepancies and Comments above:

Fees appear reasonable		Fees reduced- charged fee in excess of hours allotted	
Fees reduced- not charged at approved rates		Fees reduced- over monthly cap for: <input type="checkbox"/> bill paying <input type="checkbox"/> shopping <input type="checkbox"/> clerical	
Fees reduced- percentage based upon repeat non-compliance		Fees reduced- fees excessive/not chargeable to ward <i>(explanation above)</i>	
Fees reduced- Other <i>(explanation above)</i>			

Fees Reviewed by: _____ Date: _____