

REPORT	DUE DATE	DATES COVERED	REQUIRED DOCUMENTATION
Initial Guardian Plan	Within 60 days from date of issue of letters of guardianship	From date of issue of letters of guardianship through the last day of that month, one year later	<ul style="list-style-type: none"> <li>Initial guardian plan</li> </ul>
<i>Example:</i> <i>Letters of guardianship signed on 4/15/98</i>	<i>Between 4/15/98 and 6/15/98</i>	<i>From 4/15/98 through 4/30/99</i>	
Initial Inventory	Within 60 days from date of issue of letters of guardianship	Inventory of assets and liabilities on hand on date of filing	<ul style="list-style-type: none"> <li>Verified inventory</li> <li>Most recent bank statements</li> <li>Copies of appraisals</li> <li>Audit fee, or fee waiver petition</li> </ul>
<i>Example:</i> <i>Letters of guardianship signed on 4/15/98</i>	<i>Between 4/15/98 and 6/15/98</i>	<i>Inventory information up to date of filing</i>	
Amended Inventory	Within 30 days of finding asset		<ul style="list-style-type: none"> <li>Amended inventory</li> <li>Copy of appraisal</li> <li>Bank statements</li> </ul>
Annual accounting (calendar year)	On or before April 1st of the next calendar year	From 1/1 through 12/31 of the calendar year	<ul style="list-style-type: none"> <li>Annual accounting</li> <li>Current bank statements</li> <li>Audit fee</li> </ul>
<i>Example:</i> <i>Annual accounting for calendar year 1998</i>	<i>On or before 4/1/99</i>	<i>From 1/1/98 through 12/31/98</i>	
First Annual Plan (fiscal year)*	Within 90 days from the last day of the anniversary month of the letters of guardianship	The plan is prospective. It begins the first day of the initial plan expired through the last day of the anniversary month.	<ul style="list-style-type: none"> <li>Physician's Report dated within 90 days prior to filing</li> </ul>
<i>Example:</i>	<i>By 7/31/99</i>	<i>From 5/1/99 through 4/30/99</i>	

<i>Letters of Guardianship signed on 4/15/98</i>			
First annual accounting (fiscal year)*	Within 90 days from the last day of the anniversary month of the letters of guardianship	From the day the letters of guardianship were signed through the last day of the next anniversary month of the signing	<ul style="list-style-type: none"> <li>• Annual accounting</li> <li>• Current bank statements</li> <li>• Audit fee</li> </ul>
<i>Example:</i> <i>Letters of guardianship signed on 4/15/98</i>	<i>By 7/31/99</i>	<i>From 4/15/98 through 4/30/99</i>	
Second annual accounting (fiscal year)	Within 90 days from the last day of the anniversary month of the letters of guardianship	From the 1st day after the previous accounting expired through the last day of the anniversary month of the letters of guardianship	<ul style="list-style-type: none"> <li>• Annual accounting</li> <li>• Current bank statements</li> <li>• Audit fee</li> </ul>
<i>Example:</i> <i>Letters of guardianship signed on 4/15/98</i>	<i>By 7/31/00</i>	<i>From 5/1/99 through 4/30/00</i>	
Second annual guardianship plan (fiscal year)	Within 90 days from the last day of the anniversary month of the letters of guardianship	From the 1st day after the previous plan expired through the last day of the anniversary of the letters of guardianship	<ul style="list-style-type: none"> <li>• Annual accounting</li> <li>• Current bank statements</li> <li>• Audit fee</li> </ul>
<i>Example:</i> <i>Letters of guardianship signed on 4/15/98</i>	<i>By 7/31/00</i>	<i>From 5/1/00 through 4/30/01</i>	

\*Note: Periods covered by the annual accounting reports and the annual guardian plans filed on the same year are different. The annual accounting reports on what transpired during the previous year only, while the annual guardian plan evaluates the ward's care and condition over the previous year, as well as provides plans for the coming year.