

GUIDE TO FILING REPORTS

INITIAL REPORTS (INITIAL PLAN/VERIFIED INVENTORY)

Month Letters were signed	Report is due by...	Plan should cover these dates
January	60 days from date Letters were signed	Date Letters signed through January 31 of following year
February	60 days from date Letters were signed	Date Letters signed through February 28 (29) of following year
March	60 days from date Letters were signed	Date Letters signed through March 31 of following year
April	60 days from date Letters were signed	Date Letters signed through April 30 of following year
May	60 days from date Letters were signed	Date Letters signed through May 31 of the following year
June	60 days from date Letters were signed	Date Letters signed through June 30 of following year
July	60 days from date Letters were signed	Date Letters signed through July 31 of following year
August	60 days from date Letters were signed	Date Letters signed through August 31 of following year
September	60 days from date Letters were signed	Date Letters signed through September 30 of following year
October	60 days from date Letters were signed	Date letters signed through October 31 of following year
November	60 days from date Letters were signed	Date Letters signed through November 30 of following year.
December	60 days from date Letters were signed	Date Letters signed through December 31 of following year.

REMEMBER:

The verified inventory has no date coverage; it is a snapshot of the ward's assets at the time the letters of guardianship were issued.

ANNUAL PLANS OF THE PERSON

Month in which Letters of Guardianship Signed	Plan is Due Between	Plan Will Cover
JANUARY	February 1-April 30	February 1 to January 31
FEBRUARY	March 1- May 31	March 1 to February 28 (29)
MARCH	April 1-June 30	April 1 to March 31
APRIL	May 1 - July 31	May 1 to April 30
MAY	June 1 - August 31	June 1 to May 31
JUNE	July 1 - September 30	July 1 to June 30
JULY	August 1 - October 31	August 1 to July 31
AUGUST	September 1 - November 30	September 1 to August 31
SEPTEMBER	October 1 - December 31	October 1 to September 30
OCTOBER	November 1 - January 31	November 1 to October 31
NOVEMBER	December 1 - February 28 (29)	December 1 to November 30
DECEMBER	January 1 - March 31	January 1 to December 31

REMEMBER:

Plans of the Person are *prospective*, covering the year ahead.

ANNUAL ACCOUNTINGS

Month in Which Letters of Guardianship were Signed	Accounting is Due Between	Accounting Will Cover
January	February 1-April 30	02/01 through 01/31
February	March 1- May 31	03/01 through 02/28 (29)
March	April 1-June 30	04/01 through 03/31
April	May 1 - July 31	05/01 through 04/30
May	June 1 - August 31	06/01 through 05/31
June	July 1 - September 30	07/01 through 06/30
July	August 1 - October 31	08/01 through 07/31
August	September 1 - November 30	09/01 through 08/31
September	October 1 - December 31	10/01 through 09/30
October	November 1 - January 31	11/01 through 10/31
November	December 1 - February 28 (29)	12/01 through 11/30
December	January 1 - March 31	01/01 through 12/31

REMEMBER:

Accountings are *retrospective*, covering the year that has passed.

The first annual accounting will have the same reporting dates as your initial plan of the person. Thereafter, your annual accountings will encompass the dates set forth above, according to the month in which letters of guardianship were issued.