



**Elder Justice Center  
REVIEW OF:  
ANNUAL REPORT**

**CASE NO.: -CP-**

**GUARDIANSHIP/GUARDIAN ADVOCACY OF:**

**The Guardian(s)/Guardian Advocate(s) had a duty to file the following document(s):**

- Annual guardianship plan of the person, pursuant to Florida Statute Sections 744.367 and 744.3675 and pursuant to Florida Probate Rule 5.695;
- Annual accounting of the Ward's property, pursuant to Florida Statute Sections 744.367 and 744.3678 and pursuant to Florida Probate Rules 5.695 and 5.697;
- Final guardianship report of the Ward's property, pursuant to Florida Statute Section 744.527.

**Information about Guardian(s):**

Professional - (Guardian of Person and Property).

**Type of Guardianship:** Plenary

Date letters of guardianship issued: .

*(If guardian of person and property differ)*

Date letters as to Person issued: N/A; Date letters as to Property issued: N/A

**Reporting timeframes:**

Date both Reports due: ; Date both Reports filed: ; Report(s)/Response late: No;

If a Response, it is a Response to: N/A; Simplified Accounting: No; Calendar year: No.

Period covered in Accounting (when applicable): -

Period covered in Plan (when applicable): -

*(If reports are due or are filed on different dates)*

Date due: N/A; Date filed: N/A; Report(s)/Response late: No;

If a Response, it is a Response to: N/A; Simplified Accounting: No; Calendar year: No.

Period covered in Plan: N/A - N/A

**Contents of Report(s):**

ANNUAL GUARDIANSHIP REPORT AS TO PERSON (PLAN) - Includes "Yes" and "No" respectively for statutory compliance with F.S. §§744.367 and 744.3675:

N/A	Ward's address (at time of filing plan) provided	N/A	Name and address where ward resided during past year
N/A	Statement whether residential setting best suited for Ward (place and kind)	N/A	Length of stay at each place noted

N/A	Plans for ensuring in coming year that Ward is in residential setting best suited for current needs	N/A	A resume of medical, mental health treatment given to Ward during past year
N/A	Physician's report attached (from examination no more than 90 days before the beginning of the reporting period), including statement of capacity level	N/A	Plan for providing medical, mental health and rehabilitative services for Ward during coming year
N/A	Social and personal services currently utilized by Ward	N/A	Summary of activities during preceding year designed to increase capacity of Ward
N/A	Description of Ward's social skills, including statement of how well Ward communicates and maintains interpersonal relationships	N/A	Description of social needs of Ward
N/A	Declaration of remuneration received by the guardian from any source for services rendered to, or on behalf of, the ward, during the last reporting year.	N/A	A list of any preexisting orders not to resuscitate or preexisting advance directives, the date an order or directive was signed, whether such order has been suspended by the court, and a description of the steps taken to identify and locate preexisting DNR or advance directive.
N/A	Statement of whether Ward can have any rights restored	N/A	Statement of whether restoration of any rights will be sought
N/A	If Limited or Voluntary, was Report served on Ward		

ANNUAL GUARDIANSHIP REPORT AS TO PROPERTY (ACCOUNTING) - Includes "Yes" and "No" respectively for statutory compliance with F.S. §§744.367 and 744.3678:

N/A	Full and correct accounting of Receipts and Disbursements (see clerk's audit sheet)	N/A	Statement(s) of Ward's property on hand at close of accounting period
N/A	Copy/copies of statement(s) from each institution at close of accounting period	N/A	If Limited or Voluntary, was Report served on Ward
N/A	Declaration of remuneration received by the guardian from any source for services rendered to, or on behalf of, the ward, during the last reporting year.	N/A	If Voluntary, was physician statement attached certifying competency

**Compliance with Administrative Order:** N/A. *If "NO" or "PARTIAL" – the guardianship report(s) is/are missing the following required information:* N/A.

**Comments/Discrepancies Noted:** *None.*

**Appropriate Relief/Requirements:**

- That the above-described Annual Guardianship Report as to Person (**Plan**) is **APPROVED**.
- That the above-described Annual Guardianship Report as to Property (**Accounting**) is **APPROVED**.
- That the above-described Annual Guardianship Report as to Person (**Plan**) is **APPROVED**, despite its deficiency/deficiencies. The Guardian(s) shall remedy and/or avoid the noted deficiencies in future reports filed with the Court.
- That the above-described Annual Guardianship Report as to Property (**Accounting**) is **APPROVED**, despite its deficiency/deficiencies. The Guardian(s) shall remedy and/or avoid the noted deficiencies in future reports filed with the Court.

●That the above-described Annual Guardianship Report as to Person (**Plan**) is **DISAPPROVED**. Additional information and/or documentation and/or a written explanation, as specified hereinabove (See especially “Contents of Report(s)” and “Reviewer’s comments” sections above), is/are needed for the entry of an order approving said report.

●That the above-described Annual Guardianship Report as to Property (**Accounting**) is **DISAPPROVED**. Additional information and/or documentation and/or a written explanation, as specified hereinabove (See especially “Content of Report(s)” and “Comments/Discrepancies Noted” sections above), is/are needed for the entry of an order approving said report.

●That the Guardian(s) is **ORDERED TO FILE** the following: N/A.

●That this cause be **SET FOR HEARING** before \_\_\_\_\_, to address the issues specified herein (including the Clerk’s Report/Audit, when applicable).

●That further accountings in this cause are waived until further order of this Court. *The subject only receives Social Security income and has no assets other than clothing and personal effects.* The guardian(s) shall immediately advise the Court in writing of any substantial increase in the income of the Ward or of the Ward’s receipt of or entitlement to any asset valued at or over \$500.00.

●That the guardian(s)/guardian advocate(s) is authorized and required to file Simplified Plans in all future reporting periods, until further order of this Court. The current form for Simplified Plans is being provided with the attached Order and must be utilized.

●That the guardian(s)/guardian advocate(s) shall complete the court-approved Family Guardianship Class, in accordance with the statutory guardianship education requirement and/or the prior order (s) of this Court. The guardian(s)/guardian advocate(s) shall contact the Elder Justice Center at (813) 276-2726 to register for the next available class and shall file a Certificate of Completion with the Clerk of Court no later than \_\_\_\_\_.

●That the waiver of the guardianship education requirement, previously granted to the guardian(s)/guardian advocate(s), is deemed vacated and the guardian(s)/guardian advocate(s) shall contact the Elder Justice Center at (813) 276-2726 to register for the next available class and shall file a Certificate of Completion with the Clerk of Court no later than \_\_\_\_\_.

●That, pursuant to this Court’s previous directive, any pending guardian fee petitions will not be considered until the guardian(s) has/have substantially complied with this Court’s order on this/these Report(s).

●That the guardian(s)/guardian advocate(s) is ordered to file a petition for discharge and final report or applicable waiver(s) thereof, along with a proposed order and any and all other documents that may be necessary to close this guardianship, including a death certificate when applicable, within forty-five (45) days of the date of the attached Order.

●That N/A

●**THAT THE GUARDIAN SHALL COMPLY WITH THE COURT’S DIRECTIVES, NOTED HEREIN, BY FILING AN AMENDED REPORT, WHEN SPECIFIED, OR A WRITTEN RESPONSE, WHEN SPECIFIED, ALONG WITH ANY REQUESTED DOCUMENTATION, WITH THE CLERK OF THE CIRCUIT COURT WITHIN THIRTY (30) DAYS OF THE DATE OF THE ATTACHED ORDER.**

**•THAT WITH THE ATTACHED ORDER BEING ENTERED BASED ON THE COURT'S IN CAMERA REVIEW OF FILINGS, ANY OBJECTIONS OR REQUESTS FOR CLARIFICATION MUST BE SCHEDULED FOR HEARING WITH THE COURT PRIOR TO THE EXPIRATION OF THE TIME PERIOD PROVIDED. IF YOU BELIEVE YOU HAVE ALREADY FILED DOCUMENTS REQUIRED BY THIS ORDER, PLEASE CHECK WITH THE CLERK OF COURT TO CONFIRM RECEIPT. IF NO REVIEW IS SCHEDULED, A FAILURE TO COMPLY MAY RESULT IN THIS CAUSE BEING SET FOR JUDICIAL REVIEW AND/OR AN ORDER TO SHOW CAUSE WHY THE GUARDIAN SHOULD NOT BE HELD IN CONTEMPT OF COURT, FINED, REMOVED AS GUARDIAN OR OTHERWISE SANCTIONED AS PROVIDED BY LAW.**

Copies to:

Reviewer: EJC Reviewer Date: ,
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