



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

**CASE NO.: -CP-**

**GUARDIANSHIP/GUARDIAN ADVOCACY OF:**

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

- Initial Guardianship Plan of the person, pursuant to Florida Statute Sections 744.362 and 744.363 and pursuant to Florida Probate Rule 5.690;
- Verified Inventory, pursuant to Florida Statute Sections 744.362 and 744.365 and pursuant to Florida Probate Rule 5.690;
- Final Report of Emergency Temporary Guardian (person only), pursuant to Florida Statute Section 744.3031(8);
- Receipt of Assets of Successor Guardian.

**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

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

**Contents of Report(s):**

INITIAL GUARDIANSHIP REPORT AS TO PERSON (PLAN) - Includes "Yes" and "No" respectively for statutory compliance with F.S. §§744.362 and 744.363; 744.3031

N/A	Provision of medical, mental or personal care service	N/A	Ward's address
N/A	Residential setting best suited for Ward (place and kind)	N/A	Social and personal services provided for best interest of Ward
N/A	Physical and mental exams needed to determine Ward's needs, including names of providers and approximate dates for exams	N/A	Description of health, accident insurance, any government benefits, to which Ward may be entitled

N/A	A list of any preexisting orders not to resuscitate, or preexisting advance directives, along with the date the order or directive was signed, and whether such order or directive has been suspended by the court.	N/A	A description of the steps taken to identify and locate the preexisting order not to resuscitate or advance directive.
N/A	Guardian's attestation that he/she consulted with Ward and to the extent reasonable honored Ward's wishes	N/A	Guardian's statement that plan does not restrict Ward's liberty more than reasonably necessary to protect Ward or others from serious physical injury, illness or disease
N/A	Report was served on court appointed attorney and/or successor guardian	N/A	If Limited or Voluntary, was Report served on Ward

INITIAL GUARDIANSHIP REPORT AS TO PROPERTY (INVENTORY) - Includes "Yes" and "No" respectively for statutory compliance with F.S. §§744.362 and 744.365; 744.341:

N/A	Identifies all property	N/A	Description of all sources of income
N/A	Location of real/personal property sufficiently identified	N/A	Copy/copies of statement(s) from institution(s) where cash assets located (reflecting balances as of date letters issued)
N/A	If Limited or Voluntary, was Report served on Ward	N/A	Report was served on court appointed attorney and/or successor guardian

**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 Initial Guardianship Report as to Person (**Plan**) is **APPROVED**.
- That the above-described Initial Guardianship Report as to Property (**Inventory**) is **APPROVED**.
- That the above-described Initial 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 Initial Guardianship Report as to Property (**Inventory**) 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 Initial Guardianship Report as to Person (**Plan**) is **DISAPPROVED**. Additional information and/or documentation and/or a written explanation, as specified hereinabove (See especially "Content 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 Initial Guardianship Report as to Property (**Inventory**) 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 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) shall not, absent further order of this Court, be required to account, in the accountings filed in this guardianship, for the Social Security income that the Minor Ward receives as the result of the death or disability of one or both of the Minor Ward’s parents. Said income shall be utilized by the guardian(s) for the care and support of the Minor Ward.

●That 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 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 IN THE PRECEDING PARAGRAPH. 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.**

Reviewer: EJC Reviewer Date: _____,
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