



**Elder Justice Center
REVIEW OF:
ANNUAL REPORT - Minor Guardianship**

CASE NO.: -CP-

GUARDIANSHIP OF:

The Guardian(s) had a duty to file:

- 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/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	A resume of medical, mental health treatment given to Ward during past year	N/A	Physician's report attached (from examination no more than 180 days before the beginning of the reporting period), evaluating minor's physical & mental condition
N/A	Plan for providing medical, mental health and rehabilitative services for Ward during coming year	N/A	Summary of the Ward's school progress reports during the past year
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	Social development of Ward, including a statement of how well the minor communicates & maintains interpersonal relationships

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	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.

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 "Comments/Discrepancies Noted" 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 "Reviewer's comments" 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 this cause be **SET FOR A STATUS HEARING** before _____ for the review of the case, in consideration of the fact that the Ward (or one of the Wards, when applicable) will be reaching the age of majority within the next six (6) months – to help ensure a proper and timely termination of the guardianship as to that Ward.

●That the attorney for the Guardian(s) shall contact the office of _____ within the six-month period immediately prior to the date that the Ward (or one of the Wards, when applicable) will be reaching the age of majority to **SET A STATUS HEARING** for the review of the case, before that 18th birthday – to help ensure a proper and timely termination of the guardianship as to that Ward.

●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) 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) 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), is deemed vacated and the guardian(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) is/are 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 within forty-five (45) days.

●That this Minor Ward's assets do not exceed \$15,000.00 and are not anticipated to exceed that amount during the Ward's minority; therefore, based upon this Court's previous findings that there is no statute or case law that would require the guardianship to continue under the above-stated circumstances, with the Ward's natural guardian(s) being legally authorized to control such assets, the last report filed by the guardian(s) is accepted as a final accounting and the guardian(s) is deemed **DISCHARGED** and the surety on the guardian's bond, if any, is released from further liability.

●That the Ward receives Social Security income as the result of the death or disability of one or both of the Ward's parents. Said income is to be utilized by the guardian(s) for the care and

support of the Ward, and the guardian(s) are not be required to account for that income in the accountings filed in this guardianship, until further order of this Court.

●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: ,