

UNION COUNTY PROBATE COURT

IN THE MATTER OF THE GUARDIANSHIP OF: _____
Check One: Incompetent A Minor

Case No.: _____

GUARDIANSHIP CHECKLIST

Dear Guardian:

Below you will find a list of requirements that you as Guardian may be required to complete. **If there is an "X" on a line next to the stated requirement, you must comply with that requirement.** (*Failure to do so may lead this Court to find you in contempt with a possible consequence of removing you as Guardian.*)

_____ File an Inventory by _____.

_____ File a monthly budget with, or shortly after, the Inventory is filed.

_____ Apply to expend funds. ***No expenditures shall be made without prior Court authorization.***

_____ File a Guardian's Report annually. Your first Guardian's Report is due on:
_____ ***and*** on this date every year thereafter.

_____ A Statement of Expert Evaluation shall be filed with the Guardian's Report on the
above date ***and*** this date every year thereafter.

_____ File an account annually. The first account is due on _____.

_____ File a final account within 30 days after the guardianship is terminated.

_____ Obey all orders and judgments of the Court pertaining to the guardianship.

If you have any questions regarding the procedures due, please contact your attorney or the Union County Probate Clerks' office at 937-645-3029 ext. 3405.