

GUARDIANSHIP CLOSING CHECKLIST

(To be completed by attorney)

(All orders provided to the court must show the persons to whom the order is copied; and self addressed stamped envelopes (with no return address) shall be provided for mailing)

I. GUARDIANSHIP OF:

☐ PERSON ONLY ☐ PROPERTY ONLY ☐ PERSON & PROPERTY

II. TYPE OF GUARDIANSHIP:

☐ PLENARY ☐ LIMITED

III. REASON FOR TERMINATION OF GUARDIANSHIP

☐ SUI JURIS
☐ FULL RESTORATION ☐ FUNDS EXHAUSTED
☐ DEATH OF WARD ☐ UNABLE TO LOCATE WARD

IV. FILE REVIEW

- ☐ 1) PETITION FOR APPOINTMENT (FS 744.334)
- ☐ 2) APPLICATION FOR APPOINTMENT (FS 744.3125)
- ☐ 3) OATH, DESIGNATION OF RESIDENT AGENT & ACCEPTANCE (FS 744.347)
- ☐ 4) LETTERS OF GUARDIANSHIP (FS 744.345)

DATE SIGNED: _____

- ☐ 5) ORDER APPOINTING GUARDIAN (FS 744.344)
 - BOND REQUIREMENT (FS 744.619): ☐ Yes ☐ No
 - FILED & APPROVED BY CLERK: ☐ Yes ☐ No

- ☐ 6) INITIAL GUARDIANSHIP REPORT (FS 744.362)
 - INITIAL INVENTORY (FS 744.365): ☐ Yes ☐ No
 - INITIAL PLAN (FS 744.363): ☐ Yes ☐ No

- ☐ 7) ANNUAL GUARDIANSHIP REPORTS (FS 744.367)
 - ANNUAL PLANS (FS 744.3675): ☐ Yes ☐ No
(Covers Fiscal Year: First day of month following date Letters of Guardianship are signed through the last day of the month in which Letters of Guardianship are signed)
 - ANNUAL ACCOUNTINGS (FS 744.367): ☐ Yes ☐ No
(Covers Calendar Year, or applicable portion thereof)
 - FINAL ACCOUNTING

☐ 8) FINAL REPORT

· RECEIPT FOR GUARDIANSHIP ASSETS: ☐ Yes ☐ No

☐ 9) PETITION FOR DISCHARGE & PROPOSED ORDER

As Attorney for the Guardian, I CERTIFY this _____ day of _____,
20__, that I have personally reviewed the foregoing checklist and it is accurate.

Attorney for Guardian
Attorney's Mailing Address:

Telephone:

CLERK'S NOTES:

Revised 2/2/2012