

**MASTER AUDIT CHECKLIST**  
**GUARDIANSHIP**

(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)

NAME: \_\_\_\_\_ CASE NUMBER: \_\_\_\_\_

1. PETITION FOR APPOINTMENT \_\_\_\_\_ YES \_\_\_\_\_ NO  
with notice to all interested persons

2. APPLICATION FOR APPOINTMENT \_\_\_\_\_ YES \_\_\_\_\_ NO

3. OATH, DESIGNATION OF RESIDENT AGENT, . . . \_\_\_\_\_ YES \_\_\_\_\_ NO

4. ORDER APPOINTING GUARDIAN \_\_\_\_\_ YES \_\_\_\_\_ NO

If Yes BOND AMOUNT \$ \_\_\_\_\_

5. LETTERS OF GUARDIANSHIP \_\_\_\_\_ YES \_\_\_\_\_ NO

Date Signed \_\_\_\_\_

6. VERIFIED INVENTORY \_\_\_\_\_ YES \_\_\_\_\_ NO  
(Due 60 days from date Letters of Guardianship signed)

7. INITIAL PLAN \_\_\_\_\_ YES \_\_\_\_\_ NO  
(Due 60 days from date Letters of Guardianship signed)

8. ANNUAL ACCOUNTING (or ANNUAL RETURN) \_\_\_\_\_ YES \_\_\_\_\_ NO

If Yes, Report Period \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_  
(Same day as Annual Plan)\*

9. ANNUAL PLAN \_\_\_\_\_ YES \_\_\_\_\_ NO

(Covers \*fiscal year - First day of month following month Letters of Guardianship are signed to last day of month Letters of Guardianship were signed. Example: Letters of Guardianship signed March 2, 2007, reporting period covers April 1, 2007 - March 31, 2008. Deadline for filing 90 days after March 31, 2007, which is June 29, 2007)

If Yes, Report Period \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_

**\*THE ANNUAL ACCOUNTING MUST COVER THE PRECEDING CALENDAR YEAR OR APPLICABLE PORTION THEREOF AND MUST BE FILED WITHIN 90 DAYS AFTER THE LAST DAY OF THE ANNIVERSARY MONTH THE LETTERS OF GUARDIANSHIP WERE SIGNED.**

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