

INSTRUCTIONS FOR FILLING OUT FORM

PURPOSE. This form is to be used on each year's anniversary of being appointed guardian to file the annual accounting. The guardian of an estate is required to submit an annual accounting of the receipts and disbursements of guardianship estate funds and assets on the anniversary date of their appointment as guardian and annually thereafter, which accounting must be verified under oath by the guardian and contain an accounting of all additions to and withdrawals of the estate assets, and on request of the Court be accompanied by supporting canceled checks, vouchers, receipts, statements, or books of record.

The guardian will be required to account for all receipts and disbursements of guardianship estate funds and property. You will need to retain all canceled checks, vouchers, bills, receipts, statement or book records to prove and support expenditures made by the minor child(ren)'s estate(s). The court can request these documents at anytime.

FORM INVOLVED. The form is an **Annual Accounting**. You will need to fill in the necessary information with help from the instructions below and then file the form with the court.

How to file an Annual Accounting. You must file the Annual Accounting form by filing the original with the court.

INSTRUCTIONS FOR FILLING OUT THE FORM. To fill out this form follow these instructions. The numbers to each instruction below is the number on the blank line on the form where the information for that number needs to be inserted on the form.

Instructions for filling out the annual accounting:

- (1) on this line insert the name of each minor child you have guardianship of and their date of birth.
- (2) on this line insert your name and your spouses name if they to are seeking guardianship.
- (3) list all property or money that has come into the child(ren)'s estate in the last year and where it came from. This would include any source of income the child(ren) receives such as disability payments (SSI), lease income, money from IIM accounts, etc. Attach extra pages if necessary.
- (4) list all the money or property of the estate that was expended by you on behalf of the minor child(ren) in the last year and what it was spent on. Attach extra pages if necessary.
- (5) on this line insert the day.
- (6) on this line insert the month.
- (7) on this line insert the year.
- (8) on this line insert your name by signing.

