

# **ANNUAL REPORT OF GUARDIAN/CONSERVATOR**

## **For an Adult Only**



## **PINAL COUNTY**

### **ANNUAL REPORT**

**FOR GUARDIANSHIP/CONSERVATORSHIP  
FILED FOR ADULTS ONLY**

**INSTRUCTIONS AND FORMS**  
Provided as a Public Service by  
**AMANDA STANFORD**  
Clerk of the Superior Court

# ANNUAL REPORT OF GUARDIAN FOR AN ADULT

## CHECKLIST

**USE THE FORMS AND INSTRUCTIONS in this packet only if the following factors apply to your situation:**

√ You have been appointed the guardian for an adult,

**AND**

√ It is the yearly anniversary of the date you were appointed guardian,

**AND**

√ You want to file the court paper called the "Annual Report of Guardian."

**READ ME:** It is very important for you to know that when you sign a court document, you may be helping or hurting your court case. Before you sign any court document, or get involved with a court case, it is important that you see a lawyer to make sure you are doing the right thing.

# ANNUAL REPORT OF GUARDIAN FOR AN ADULT

## How to assemble these documents:

This packet contains general information and instructions for the Annual Report of Guardian for an Adult. Be sure the documents are in the following order:

Order	Title	# of Pages
1	Checklist: Use these forms if...	1
2	Table of Contents (this page)	1
3	Instructions: How to Fill Out "Annual Report of Guardian for an Adult"	1
4	"Annual Report of Guardian for an Adult"	3
5	Procedures: How to file the "Annual Report of Guardian for an Adult"	2

You have permission to use these documents for any lawful purpose. These forms shall not be used to engage in the unauthorized practice of law. The Court assumes no responsibility and accepts no liability for actions taken by users of these documents, including reliance on their contents. The documents are under continual revision and are current only for the day they were received. It is strongly recommended that you verify on a regular basis that you have the most current documents.

# INSTRUCTIONS

## How to Fill Out the Annual Report of Guardian/Conservator for an Adult

**USE THIS PACKET** if you have been appointed as the Guardian and/or Conservator for the Ward, and it has been a year since your appointment. You must complete this form every year you are the Guardian and/or Conservator for the Ward on or before the anniversary date of your *letters of appointment* as Guardian/Conservator. Follow these steps to complete this form:

**STEP 1:** Complete the ANNUAL REPORT OF GUARDIAN/CONSERVATOR. Use **Black Ink Only!!!**

### Write The Following Information:

- Next hearing date.
- The Name of the Ward (the person you are the Guardian/Conservator for).
- The Ward's date of birth, address and telephone number.
- The name of the Guardian/Conservator.
- Guardian's/Conservator's address, telephone number and email address.
- The name of the Ward's Physician.
- The Physician's address and telephone number.

### Complete the Following: (Section # 1)

- Describe where the Ward lives (not the address). Things to include would be whether it was a private home, boarding home, or nursing home. How many people live in the Ward's room? Who looks after the Ward, and so forth, **AND**
- The name of the person in charge or the name of the place where the Ward lives, the address, and the telephone number.

### Confidential Information: (Section # 2)

#### **SPECIAL HANDLING REQUIRED:**

Give the following information about the Ward's physical and mental health:

- Write in the date the Ward was last seen by a doctor,
- Describe any changes in the Ward's health, **AND**
- Make sure you attach a current copy of the doctor's report about the Ward's current physical and mental health.

### Information about the Guardianship/Conservatorship: (Section # 3)

- Write in the number of times you have seen the Ward in the last 12 months, and the date of your last visit.
- Then tell the Judge/Commissioner whether or not you think the guardianship/conservatorship should continue and the reasons it should or should not continue.

### Information about State, County, Federal Agency Services: (Section # 4)

- If the Ward receives any state, county or federal agency services, write in the name of the agency, and describe the services the Ward receives. If the Ward does not receive any services, check **NO**.

### Information about the Person Responsible for the Ward's Assets: (Section # 5)

- Write in the name, address, and telephone number of the person responsible for the Ward's assets. If the Ward does not have any assets, then write in N/A for not applicable.

### Signature: (Section # 6)

- Make sure you date the document and sign and print your name.

### Mailing Affidavit: (Section # 7)

- Write the names and addresses of the people to whom you mailed a **copy** of the ANNUAL REPORT and the date you mailed them. Then sign your name to show that you mailed the document.

**STEP 2:** Read **Procedures: How to File the Annual Report of Guardian/Conservator for an Adult.**

Name of Person Filing: \_\_\_\_\_  
 Street Address: \_\_\_\_\_  
 City, State, Zip Code: \_\_\_\_\_  
 Telephone Number: \_\_\_\_\_  
 Email Address: \_\_\_\_\_  
 Representing Self (No Attorney) or  Represented by Attorney  
 If Attorney, Bar Number: \_\_\_\_\_

**SUPERIOR COURT OF ARIZONA  
 PINAL COUNTY**

In the Matter of (check one or both)  
 Guardianship  Conservatorship

CASE NUMBER: \_\_\_\_\_  
**ANNUAL REPORT OF GUARDIAN/CONSERVATOR  
 (ADULT)**  
 PERIOD FROM \_\_\_\_\_ TO \_\_\_\_\_  
MO DAY YR MO DAY YR

\_\_\_\_\_  
 Name of Ward

HONORABLE: \_\_\_\_\_

**Instructions to Guardian/Conservator:** Arizona law (A.R.S. 14-5209(4) and 14-5315) requires every guardian/conservator of an adult or minor Ward to advise the court each year regarding their Ward. Please complete this report each year on the anniversary date of your appointment as guardian/conservator. When complete, mail the report to Pinal County Superior Court Clerk, PO Box 2730, Florence AZ 85132. You must also mail a copy of the report to anyone else who has appeared in the case. This includes the Ward's attorney, if the Ward is represented by an attorney. If the Ward is not represented by an attorney, you must mail a copy to the Ward, if he or she is at least 14 years old. You must also fill out the Affidavit of Mailing at the end of the report to show the names and addresses of all the people to whom you mailed the report and the date on which you mailed it. (If necessary additional pages may be attached.)

Next Hearing Date: \_\_\_\_\_  
 Name of Ward: \_\_\_\_\_  
 Ward's Address: \_\_\_\_\_  
 Ward's Birth Date: \_\_\_\_\_ Telephone Number: \_\_\_\_\_  
 Name of Guardian/Conservator: \_\_\_\_\_  
 Guardian's/Conservator's Address: \_\_\_\_\_  
 Guardian's/Conservator's Telephone Number: \_\_\_\_\_ Email: \_\_\_\_\_  
 Ward's Current Physician: \_\_\_\_\_  
 Physician's Address: \_\_\_\_\_  
 Physician's Telephone Number: \_\_\_\_\_

**INFORMATION ABOUT THE ABOVE-NAMED WARD:**

- Describe the Ward's current residential situation (private home, boarding home, nursing home, etc.):  
 \_\_\_\_\_  
 \_\_\_\_\_

Name and Address of Facility:

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Name and Telephone Number of Person in Charge:

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2. Date the Ward was last seen by a physician: \_\_\_\_\_  
**ATTACH A COPY OF THE PHYSICIAN'S REPORT ON WARD'S CURRENT PHYSICAL & MENTAL CONDITION.**

List any major changes to the Ward's physical and/or mental condition that occurred within the last year:

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3. Number of Times Guardian/Conservator has seen Ward in last 12 months: \_\_\_\_\_  
Date of Last Visit: \_\_\_\_\_

Should Guardianship/Conservatorship be continued?  YES  NO  
Why? (Guardian's/Conservator's Opinion):

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4. Does the Ward receive any state, county or federal agency services?  YES  NO  
If so, specify type of services and the name of the person within that agency whom the Ward is in contact:

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**NOTE:**

**If this is a Conservatorship Action, Attach an Annual Accounting/Status Report of the Ward's Assets.**

5. Name, Address, and Telephone Number of person responsible for managing the Ward's assets:

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**NOTICE TO GUARDIAN:** A guardian or conservator appointed pursuant to Title 14, Chapter 5 SHALL provide a written notice to the court disclosing the date of death of a Ward or protected person within TEN (10) days after learning of the Ward or protected person's death. Further, a conservator SHALL file a final accounting with the court within NINETY (90) days after the Ward's or protected person's date of death.

6. Signed this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_\_.

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Printed Name of Guardian/Conservator

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Signature of Guardian/Conservator

**7. AFFIDAVIT OF MAILING:** I promise I mailed this Annual Report of Guardian/Conservator to the following people at the following address(es) on this date: \_\_\_\_\_  
(Month/Day/Year)

• Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
City, State, Zip Code: \_\_\_\_\_

• Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
City, State, Zip Code: \_\_\_\_\_

• Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
City, State, Zip Code: \_\_\_\_\_

• Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
City, State, Zip Code: \_\_\_\_\_

\_\_\_\_\_  
(Signature)

\_\_\_\_\_  
(Date)

Sworn to or Affirmed before me this: \_\_\_\_\_ by \_\_\_\_\_  
(Date)

My Commission Expires: \_\_\_\_\_  
(Deputy Clerk or Notary Public)

# HOW TO FILE: ANNUAL REPORT OF GUARDIAN FOR AN ADULT

**USE THIS PACKET** if you have been appointed as the guardian for the Ward and **it has been a year since your appointment.**

## WHEN AND HOW TO FILE THE ANNUAL REPORT:

**STEP 1:** The guardian for the Ward must complete the ANNUAL REPORT **every year, on or before the anniversary date** of your appointment as guardian.

**STEP 2:** Complete the ANNUAL REPORT in **black ink**. Answer all of the questions. Make copies of the annual report according to who needs to receive a copy of the Annual Report:

- Ward, if over 14 years of age
- Ward's Conservator (if applicable)
- Ward's spouse or the Ward's parents if the Ward is not married and has at least one living parent
- Attorney for Ward
- Any other interested person who has filed a demand for notice with the Court

**STEP 3:** File The **ORIGINAL** Annual Report With The Court Through The Following:

**IN PERSON:** Bring the **original and copies**, to the Clerk of Court. You should go to the Court **at least two hours before it closes**. You may file your court papers at one of our Pinal County Superior Court locations:

**Visit our website for office locations or feel free to give us a call.**

**Contact Information for all Offices**

Toll Free: 888.431.1311 • Local: 520.509.3555 or 311 • Fax: 520.866.5320

[www.cospinalcountyz.gov/office.html](http://www.cospinalcountyz.gov/office.html)

**BY MAIL:** If you cannot or do not want to file the original report in person, you can also mail the original and copies of the Annual Report to the Superior Court. Include a self-addressed stamped envelope so that the Clerk can return your stamped conformed copies to you.

**CLERK OF THE SUPERIOR COURT**

PO Box 2730  
Florence AZ 85132

**STEP 4:** The Clerk's office will file the original Annual Report and stamp your copies. The copies will be returned to you and you are to mail a **copy** of the ANNUAL REPORT to any interested person.



**CHANGE OF ADDRESS:**

**STEP 5: GUARDIAN/CONSERVATOR'S CHANGE OF ADDRESS:** If you have been appointed Guardian or Conservator, you must list your address in the initial Petition and you must **immediately** notify the Clerk of the Court in writing if your mailing address changes during the term of your appointment. Your notice of change of address must contain the case number(s) of the case(s) in which you have been appointed.

**STEP 6: WARD'S CHANGE OF ADDRESS:** If you have been appointed as a Guardian or Conservator, you must notify the Clerk of the Court in writing within **3 Days** of the change in the address of a Ward or Protected Person. The Notice must contain the case number and the Ward's or Protected Person's new address. All written Notices may be delivered personally or can be mailed to the Court at the address given above.