

STATE OF MICHIGAN PROBATE COURT COUNTY OF MACOMB	YOUR RESPONSIBILITIES AS GUARDIAN	FILE NO.
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In the matter of \_\_\_\_\_

**Tell the court if your ward dies.** Send a copy of the death certificate or obituary to the address below:

Macomb County Probate Court  
40 North Main St. 5<sup>th</sup> Floor Mt. Clemens, MI 48043

**Tell the court if you or the ward's address and/or telephone number changes.** If you fail to tell the court about an address and/or telephone number change of yourself or your ward within 14 days, you could be suspended. Send to:

Macomb County Probate Court  
40 North Main St. 5<sup>th</sup> Floor Mt. Clemens, MI 48043

**An attorney, appointed by the court, will come and meet with the ward and guardian after one year.** The law requires that every adult guardianship case be reviewed after one year, and at least once every three years after that. Failure to cooperate could lead to your suspension.

**You must file an annual report, even if a court-appointed attorney meets with the ward and guardian.** The law requires you file an **Annual Report on Condition of Ward** form each year – it is due on the anniversary of the date you became guardian. The Court website <http://probatecourt.macombgov.org> is available to you to download an **Annual Report** form, complete and file it within 30 days before or after your anniversary date of appointment. Annual Report forms are also available to you to pick up at the Court. Failure to file the necessary form **WILL** lead to your suspension as guardian. Mail the form to the following address:

Macomb County Probate Court  
40 North Main St. 5<sup>th</sup> Floor Mt. Clemens, MI 48043

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#### GUIDELINES FOR RECORD KEEPING BY GUARDIANS AND CONSERVATORS

##### AFTER RECEIVING LETTERS OF AUTHORITY

- File a change of address card with the Post Office to receive ward's mail.
- Create one file for each ward, even if the ward has a conservator and guardian.
- Keep the following documents in the ward's file: all petitions, letters of authority, inventories, fiduciary bonds, annual reports, accounts, guardian ad litem (GAL) reports, reports on review of guardianship, and closing papers.

##### FINANCES AND RECORD KEEPING:

- There should be one bank account for each ward with a caption such as: "Legally Incapacitated Adult"
- The only time more than one account is necessary is if the ward has more money than is needed to cover living expenses for 6 months. Then a money market or short term CD would be appropriate.
- When closing the ward's account and opening a new one, keep all opening and closing documents.
- All checks payable to the ward must be deposited into the bank account.
- Open all bank and other statements immediately to identify any irregularities.
- All checks must be hand signed by the fiduciary. Never use a signature stamp. Do not allow anyone else to sign checks. Keep in a secure location.
- Keep a copy of all bank statements, checks written and receipts.
- Pay for everything by check so you will have documentation.
- All spending must only be used to benefit the ward and not the fiduciary or family members.
- If there is a question about expenditure, file a petition with the court to obtain court approval.
- Demand and obtain written bills before making a payment.
- Computerized records must be backed up and stored in at least one other location.
- Keep a record documenting visits to all wards.