

LOC.R. 66.12 INVENTORY, FUND RELEASE, EXPENDITURES AND IDENTIFICATION
OF LEGAL DOCUMENTS

Within three months of appointment, a guardian of the estate shall file an inventory of the ward's assets and income. If the assets include real estate, a legal description of the ward's real estate interest should accompany the Inventory. Any joint owners or death beneficiaries for the assets shall be listed. Funds in the name of the ward shall not be released to the guardian without the approval of an Application to Release Funds (SPF 15.6) or other specific court order. The expenditure of funds by a guardian shall not be approved until a Guardian's Inventory (SPF 15.5) has been filed and an Application to Expend Funds (SPF 15.7) has been approved.

Within three months of appointment the guardian shall file a list of all of the ward's known important legal papers, including but not limited to estate planning documents, advance directives and the location of such papers. Until a Standard Probate Form is adopted for this purpose, the adult guardian may use the local form "Listing of Ward's Important Legal Papers" that is available at the Adult Guardianship tab on the Court's website. If it becomes known to the guardian that such information has changed or the existence of other important legal papers becomes known, the guardian shall report that new information to the Court in writing within thirty days of discovery.