

In the Guardianship of

§ In County Court No. _
§

_____, an Incapacitated Person § Fort Bend County, Texas

GUARDIAN'S REPORT ON THE CONDITION AND WELL-BEING OF A WARD

Check One - INITIAL ANNUAL FINAL

Check one: Guardianship of Person Only Guardianship of Person and Estate

REPORTING PERIOD ____/____/____ THROUGH ____/____/____

(The reporting period must be a specific date in the format of MM/DD/YYYY to MM/DD/YYYY. The report should NOT be filed BEFORE the end date of the reporting period. Example: If you are reporting from 02/23/2014 to 02/23/2015, the report should be filed on 02/24/2015 or later. Reports filed without specific dates or filed before the end date can NOT be approved until corrections are made. If you are unsure of the dates, please call or email the Court Probate Auditor.)

On this day, the Guardian in this matter stated the following under penalty of perjury, declaring that each statement is true and correct:

1. WARD: Name _____ Age ____ / DOB _____
Address (no P.O. Box) _____
City/State/Zip _____
Phone _____ New Address? YES NO

2. GUARDIAN(s): Name(s) _____
Age(s) _____ / DOB(s) _____
Email _____

If co-guardians, both must be listed.

Address (no P.O. Box) _____
City/State/Zip _____
Phone _____ New Address? YES NO
Relationship to Ward: _____

During the past reporting year, have you been convicted of a felony or a misdemeanor other than a minor traffic offense? YES NO If YES, explain _____

If you are a private professional guardian, a guardianship program, or Texas Health and Human Services Commission (HHSC), have you been the subject of an investigation conducted by the Judicial Branch Certification Commission during the past reporting year? YES NO

3. If this is your final report, answer the questions in box below. **If this is not your final report, skip to #4.**

FINAL REPORTS ONLY

I am filing a Final Report because (check one)

- I am resigning the _____ has turned 18 (attach copy of birth certificate)
- the Ward has died (attach copy of death certificate)
- other; if "other," please explain: _____

If you are **resigning**, has a successor guardian been identified? YES NO

Name _____ Age _____ DOB _____
Address _____
City/State/Zip _____
Phone: _____

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4. Do you reside with the Ward? YES NO

If NO, please state how many times during the last year that you visited the Ward in person: _____ times.

Date of last visit: _____

*If zero, please explain: _____

5. Ward's residence is (check **only one**):

- Ward's home Foster home
- Guardian's home Boarding home
- Relative's home (give relative's name and relationship) _____

Or in the type of facility checked below:

- Nursing Home Group home Hospital/Medical facility
- State Supported Living Center (State School) Other

Please provide NAME of facility: _____

6. How long has the Ward lived at this address? _____
Any change in residence in last year? Yes No If YES, explain: _____

7. **All guardians must** report on the amount and source of the Ward's income, regardless of whether the income comes to someone other than the guardian (such as the Ward's residence). Note that Social Security benefits are considered income, but that child support is not.

A. Source of Ward's income: _____

B. **Total Annual** amount of Ward's income: _____

If zero, explain: _____

8. In addition to the Guardian of the Person, is there a **Court-appointed** Guardian of the Ward's **Estate**?

Yes No Note: just because you are the Rep Payee does not necessarily mean there is a guardianship of the estate.

Depending on your answer, please answer the questions in only one of the boxes below:

If you answered "NO" to question 8

A. If there is **NOT** a Guardian for the Ward's estate, please answer the following questions and attach additional information as directed:
(1) Has a Court Order directed you to manage funds up to \$20,000 of the Ward **other than Social Security funds**? Yes No
→ If YES, you **MUST** report on your management of those funds by attaching an income _____ and expenses worksheet to this Annual Report. Forms are available on the Court's website or at the Court (1422 Eugene Heimann Circle, First Floor).
(2) Are you the **representative payee** of the Ward's Social Security Disability (SSI) or Social Security Retirement Benefits? Yes No

OR

If you answered "YES" to question 8

B. If there **IS** a Guardian for the Ward's estate, please answer the following two questions:
(1) Are you the Guardian for the Ward's estate? Yes No
(2) Do you as Guardian of the Person receive an allowance from the Guardian of the Estate?
 Yes No
If YES, annual amount of allowance received _____

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9. During the past year the Ward has been treated or evaluated by the following professionals.

As a guardian, it's your duty to know this information and to provide the information to the Court even if the Ward's residential facility arranges the services.

Physician. Name: _____
Describe: _____

Does the Ward see this doctor on a regular basis? Yes NO

Psychiatrist. Name: _____
Describe: _____

Social Worker or other case worker. Name: _____
Describe: _____

Dentist. Name: _____
Describe: _____

Other. Name: _____
Describe: _____

10. Social Conditions: During the past year the Ward has participated in the following activities.

*What does your Ward do all day? Note that for each type of activity checked, you **must describe the activities** (e.g., movies, bowling, Special Olympics, church, eating out, etc.). Don't leave blank or simply write the name of the residential facility.*

- Recreational: _____
- Educational: _____
- Social: _____
- Occupational: _____
- None available.
- Refuses or is unable to participate.

11. Supports and Services : During the past year the Ward received the following supports and services:

- Representative Payee for Social Security benefits
- Services from a local mental health/intellectual and developmental disability authority (*include name of provider and location where services are provided*):

- Services from a Medicaid program, including a Medicaid waiver program (*include name of provider and location where services are provided*):

- Informal supports and services (*include name of provider and location where services are provided*):

- Other (*include name of provider and location where services are provided*): _____

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12. During the past year the Ward stopped receiving or attempted to receive the following supports and services (*provide reason the support or service listed was not received or was discontinued*): _____

3 During the past year the Ward's mental health has:

- Remained about the same
- Improved. Describe: _____
- Deteriorated. Describe: _____

4 As Guardian of the Person, I HAVE FILED HAVE NOT FILED for **Emergency Detention of the Ward** pursuant to the Texas Health & Safety Code. (An example of emergency detention is a request for an emergency hospitalization of the Ward for mental health or safety reasons.) If you answered **HAVE FILED**, please list the number of times and the dates: _____

5 During the past year the Ward's physical health has:

- Remained about the same

⑧ Improved. Describe: _____

⑧ Deteriorated. Describe: _____

6 As guardian, I believe the Ward's living arrangements are Excellent Average Below average

If below average, explain: _____

7 As guardian, I believe that my Ward is:

Happy/Content with living situation Unhappy with living situation

8 As guardian I believe my Ward DOES DOES NOT have unmet needs.

(Unmet needs = problems with food, shelter, medical care)

If you answered DOES, please explain: _____

19 The power authorized by this guardianship should be:

⑧ Unchanged

⑧ Decreased (explain: _____)

⑧ Increased (explain: _____)

0 As guardian, it is my opinion that the Ward **DOES HAVE** capacity or sufficient capacity with supports and services for (*check one*):

1. complete restoration of the Ward's capacity Yes NO or

2. modification of the guardianship Yes NO

If no, state the reason(s) why the Ward does not have capacity or sufficient capacity with supports and services for a complete restoration of their capacity or modification of the guardianship: _____

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21. As guardian, I am taking the following actions to encourage the development of the ward's maximum selfreliance and independence: _____

22. Check each box immediately below to affirm that you already have taken care of the specified duty or that you will do so within the time indicated. **These duties are required by Texas law.**

I affirm that I already have done the following or will do so within one week of the date I sign this Report: I have communicated or will communicate to the Ward that (1) I am seeking to continue, modify, or terminate the guardianship and (2) the Ward has the opportunity to appear before the court to express the ward's preferences and concerns regarding whether the guardianship should be continued, modified, or terminated.

I affirm that I will give the Ward a copy of this annual report within 30 days of the date I sign the Report.

23. **Guardian's Bond:** Check the appropriate box below, adding an explanation if requested.

Note: Even if Ward's residential facility pays your bond premium for you, it is your responsibility to verify that the bond payment is current and then mark "have paid." If you are not sure, you can look for a statement that the premium was paid on one of the accountings the facility sends you, or you can call the facility and ask.

I have a **CASH BOND** on file with the Court.

I have a corporate surety bond with a yearly premium and **HAVE PAID** the bond premium for the next reporting period.

I have a corporate surety bond with a yearly premium and **HAVE NOT PAID** the bond premium for the next reporting period (explain: _____)

I have a corporate surety "forever" bond and I have paid the one-time bond premium.

HHSC guardianship.

24. Please state any additional information concerning the Ward that you would like to share with the Court. (You may continue on another page.)

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25. Remember to order current "Letters of Guardianship."

A. **Fill out the request form on the next page.** Letters are **not** sent automatically; you must complete and submit the following form for the clerk's office to issue Letters.

B. **Please note two additional things:**

(1) There may be fees required by the clerk. You can call the clerk's call center to verify: (281) 341-8665.

(2) If there is also a guardianship of the estate, new Letters cannot be issued until the annual account is approved. (Note that an annual account cannot be approved until your attorney has submitted *everything* necessary to the Court, including required back-up.)

Complete the following. The signature below does not require a notary.

I, _____, the guardian of the person for _____,

(insert name of guardian of the person)

(insert name of Ward),

in Fort Bend County Texas, declare under penalty of perjury that the foregoing is true and correct.

Executed on _____ 20 _____

Guardian's signature

If this report is for Co-Guardians, also complete the following:

I, _____, the guardian of the person for _____,

(insert name of co-guardian of the person)

(insert name of Ward),

in Fort Bend County Texas, declare under penalty of perjury that the foregoing is true and correct.

Executed on _____ 20 _____

Co-Guardian's signature (if any)

Mail to:

Fort Bend County Clerk's Office
ATTN: Probate Department
301 Jackson St
Richmond, TX 77469-3108

Or deliver to:

Fort Bend County Clerk's Office
1422 Eugene Heimann Circle, First Floor Richmond, TX
77469

Or electronically file with <http://www.efiletexas.gov/>

FORT BEND COUNTY CLERK'S OFFICE

PROBATE COPY REQUEST

Complete the Copy Request form. Complete the payment for copy request. Instructions for processing credit card payments, please review **Credit Card Payment** page. Send the completed copy request form along with payment information to cclerkcourts@fortbendcountytexas.gov for processing.

DATE: _____ CAUSE NO. _____ ESTATE/GUARDIANSHIP
OF _____ NAME OF
PERSON/COMPANY REQUESTING: _____ ADDRESS: _____

PHONE NUMBER: _____ EMAIL: _____

- CALL FOR PICKUP CALLED CUSTOMER FOR PICKUP ON _____
- HOLD FOR PICKUP
- MAIL WHEN READY
- EMAIL WHEN READY

PLEASE CHECK ONE:

- NON-CERTIFIED COPY (Plain) \$1.00 per page
- CERTIFIED COPY – PAPER (Seal) \$1.00 per page PLUS \$5.00 per certification
- E-CERTIFIED COPY (Seal) \$1.00 per page PLUS \$5.00 per certification

LIST OF COPIES NEEDED:

NO. OF PAGES COPY OF:

- _____ APPLICATION
- _____ WILL
- _____ ORDER
- _____ INVENTORY
- _____ LETTER/S _____
- _____
- _____
- _____

ESCROW USERS, PLEASE CHECK ONE: CHARGE ESCROW ACCOUNT # _____
 DO NOT CHARGE MY ACCOUNT

*****If you pay by check the following is required: Printed name, address and phone number on the check Date of birth and driver's license number of signer.**

ALL REQUESTS MUST BE SIGNED.

Confidential information may be redacted from the documents requested.

Signature of Person Requesting

Amount Due: \$ _____ Date: _____ Payment Taken By: _____

CASH _____ CHECK # _____ RECEIPT # _____ Date

Copies Mailed: _____ Or Emailed: _____ Copies Made By: _____