Checklist for:

Guardianship Accounting

Statutory requirements: Florida Statutes §§ 744.3678 & 744.3679 (744.368 – clerk responsibilities)

| Guardianship of: |
| --- |
| | File #: |  | Date: | |  | | --- | --- | --- | --- | --- | | Attorney: |  | |  |  | |

| Docket# | Item# | Date |  |
| --- | --- | --- | --- |
|  |  |  | There are no comments from the clerk on the blue review sheet |
|  |  |  | The funds are in a restricted account (petition designating depository, order designating depository, and receipt from depository) or Bond has been issued |
|  |  |  | There were no disbursements; OR |
|  |  |  | There were disbursements, but they were for attorney or guardian fees only |
|  |  |  | Dates and amounts of disbursements: (or on separate page attached); AND |
|  |  |  | The disbursements are supported by court orders; OR |
|  |  |  | There were a few disbursements for items other than attorney or guardian fees. |
|  |  |  | Dates and amounts of disbursements: (or on separate page attached); AND |
|  |  |  | The disbursements are supported by court orders; |
|  |  |  | The accounting is signed by the \_\_\_ attorney AND \_\_\_\_ all guardians of the property |
|  |  |  | Must be served on ward, unless ward is a minor or totally incapacitated (744.367 (3) & (4)) |
|  |  | COMMENTS: | There were numerous non-attorney or guardian fee disbursements and further review is needed. |
|  |  |  | There has been a marked decrease in the guardianship assets: |
|  |  |  | Total value of assets last accounting:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
|  |  |  | Total value of assets this accounting:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
|  |  | Other: |  |

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| --- |
| Comments: |
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