Checklist for:

Guardianship – Petition for Successor Guardian

LEGAL STANDARD: FS 744.309, 744.312, 744.3125, 744.3135, 744.202, 744.334, 744.3371,

744.317, 744.467, 744.471,744.607 p. rule 5.650

Age of ward: years old

Proposed guardians Relationship to ward: \_\_\_\_\_ family \_\_\_\_\_ friend \_\_\_\_\_\_ professional

\_\_\_ Former Guardian: \_\_\_\_\_ deceased \_\_\_\_\_, removed \_\_\_\_\_\_\_resigned

If deceased, proof of death filed? \_\_\_ [5.171(a)]

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

| Docket# | Item# | Date |  |
| --- | --- | --- | --- |
|  |  |  | Petition verified [744.334(1), 5.560] |
|  |  |  | Name, age & residence and P.O. address of alleged incapacitated [744.334(1), 5.560(a)(3)] |
|  |  |  | Residence and P.O. address of petitioner [744.334(1), 5.555(c)(2), 5.560(a)(2)] |
|  |  |  | Names & addresses of parents, if none then next of kin [744.334(1), 5.555(c)(4), 5.560(a)(5)] |
|  |  |  | Name & address of proposed gdn & gdn willing [744.334(1), 5.555(c)(5), 5.560(a)(6)] |
|  |  |  | Guardian’s relationship to & previous association w/ to ward [744.334(1), 5.555(c)(6), 5.560(a)(7)] |
|  |  |  | Nature of Incapacity, if any and is the Guardianship of Plenary/Limited [744.334(1), 5.555(c)(8), 5.560(a)(4)] |
|  |  |  | Nature & value of guardianship property [744.334(1), 5.555(c)(8), 5.560(a)(4)] |
|  |  |  | Is proposed Guardian providing serves as a health care provider? |
|  |  |  | Petitioner is Fla. resident or is a relative of the ward [744.309(1), (2)] |
|  |  |  | Petitioner is related by blood or marriage and entitled to preference [744.312(2)(a)]: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
|  |  |  | Application for Appointment has been filed [744.3125] |
|  |  |  | Oath of Guardian & designation of resident agent [744.347, 5.110, 5.600] |
|  |  |  | Level 2 Criminal Background Check & Credit History Investigation [744.3135]  and filed with the Court or proof of transaction provided unless waived] |
|  |  |  | Venue is in county where ward resides OR Non-FL res w/ prop in county [744.202(2)] |
|  |  |  | Is the Ward a Veteran? |
|  |  |  | Notice to next of kin or natural parents or other interested persons [744.3371, 5.560(e)]: listed as follows with relationship to ward: |
|  |  |  | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
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|  |  |  | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
|  |  |  | Proposed Orders: (1) Appointing Guardian & (2) Letters (3) self addressed envelopes |
|  |  |  | A Successor must be appointed & qualified before guardian is relieved of duty. 744.471 |
|  |  |  | Final Report filed prior to Order of Discharge being entered [744.467] |

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| Comments: |
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