Checklist for:

Guardianship – Petition to Waive Education

Statutory Requirements: F.S. 744.3145 (1) ward is entitled to a competent guardian (2) each person must receive 8 hours of instruction - 4 hours for minor’s property (3) the instruction must be completed within four months from the date of appointment, course must be authorized by chief judge (4) expenses may be paid from ward's estate (5) the court may waive some or all of the requirements, but must make its decision on a case by case basis, considering the experience and education of the guardian, the duties assigned to the guardian, and the needs of the ward.

GENERAL RULE: Education course is required unless waived by the court for good reason as determined on a case-by-case basis

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

| Docket# | Item# | Date |  |
| --- | --- | --- | --- |
|  |  |  | Ward is minor |
|  |  |  | Ward is adult |
|  |  |  | Age of Ward: |
|  |  |  | Guardian’s relationship to ward |
|  |  |  | Are all funds in restricted account? |
|  |  |  | Depository receipt filed? |
|  |  |  | Is Guardian required to file reports? |
|  |  |  | Is Guardian required to file accounting? |
|  |  |  | Nature of Assets in Guardianship |
|  |  |  |  |
|  |  |  | Value of Guardianship Assets: $ |
|  |  |  | Status of recent accounting |
|  |  |  | Reason given to waive guard educational requirements? |
|  |  |  | Any alternative to waiver? |
|  |  |  | Parties entitled to notice: |
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| Comments: |
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