Checklist for:

Initial Guardianship Plan

Statutory requirements: Florida Statutes § 744.363 – Initial Guardianship Plan

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

| Docket# | Item# | Date |  |
| --- | --- | --- | --- |
|  |  |  | **Are there any comments from the clerk on the review sheet\_\_\_\_\_\_\_\_\_\_\_\_?** |
|  |  |  | **THE INITIAL GUARDIANSHIP PLAN MUST:** |
|  |  |  | (1)(a) Include the provision of medical, mental, or personal care services for the welfare of the ward; |
|  |  |  | (b)  Include the provision of social and personal services for the welfare of the ward; |
|  |  |  | (c)  Include the place and kind of residential setting best suited for the needs of the ward; |
|  |  |  | (d)  Include the application of health and accident insurance and any other private or governmental benefits to which the ward may be entitled to meet any part of the costs of medical, mental health, or related services provided to the ward; and |
|  |  |  | (e)  Include any physical and mental examinations necessary to determine the ward’s medical and mental health treatment needs. |
|  |  |  | (2) Be based on the recommendations of the examining committee’s examination, as incorporated into the order determining incapacity. |
|  |  |  | (3) Be in accordance with the wishes of the ward to the maximum extent reasonable and contain an attestation that the guardian has consulted with the ward and, to the extent reasonable, has honored the ward’s wishes consistent with the rights retained by the ward under the plan ***unless the ward has been found to be totally incapacitated or is a minor under the age of 14 years.*** |
|  |  |  | (4) Not restrict the physical liberty of the ward more than reasonably necessary to protect the ward or others from serious physical injury, illness, or disease and to provide the ward with medical care and mental health treatment for the ward’s physical and mental health. |
|  |  |  | The initial report was served on the ward, unless the ward is a minor under the age of 14 years or is totally incapacitated, and the attorney for the ward. |

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| Comments: |
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