

GUARDIANSHIP/CONSERVATOR DOCUMENTS & PROCESS:

<i>REQUIRED DOCUMENTS:</i>		
1	Medical Certification Form	<i>gdn-medcert</i>
2	Petition	<i>gdn-petition</i>
3	Order Appointing Guardian <i>ad litem</i>	<i>gdn-galorder</i>
4	Confidential information form	<i>gdn-coninfo</i>
5	Notice of Hearing	
	a Respondent (14 point type required!)	<i>gdn-noticeward</i>
	b One to each member of family/next of kin	<i>gdn-noticfam</i>
6	Order appointing Guardian/Conservator	<i>gdn-gdnorder</i>
7	Certificate of Compliance	<i>gdn-certcompl</i>
8	Response of Guardian ad litem	<i>gdn-Galresp</i>

<i>OTHER USEFUL DOCUMENTS</i>		
9	Court filing cover sheet	<i>gdn-ctcover</i>
10	Interview form	<i>gdn-interview</i>
11	Data sheet to help clerk at qualification	<i>gdn-clerkinfo</i>
12	"Top ten" rules for Conservators	<i>gdn-consrule</i>
13	Petition cover letter to client reminding of hearing	<i>gdn-petcvltr</i>
14	Transmittal letter to Guardian <i>ad litem</i>	<i>gdn-galcvltr</i>
15	Form and procedure checklist (this document)	<i>gdn-cklist</i>

All above forms are on Hart & Hart Attorneys website: www.hhatty.com; *.pdf files load from a click. Almost all documents are in three formats: Adobe™ (*.pdf); Word™ '97 (.doc); and simple text (*.txt). You can click the *.pdf files from the Guardianship page; to download the others, enter "www.hhatty.com/formname.xxx" where formname is the name of the form and xxx is the format saved (pdf, doc or txt).

PROCEDURE:	
1	Interview client and get basic information <i>gdn-interview</i>
2	Determine whether guardianship appropriate and extent of same Discuss fiduciary responsibilities with client
3	Prepare Petition <i>gdn-petition</i>
4	Prepare Order appointing Guardian <i>ad litem</i> (GAL). <i>gdn-galorder</i>
5	File Petition with Clerk
6	Get assigned judge to enter GAL Order (and get certified copy)
7	Get hearing date from assigned judge. (clear w/ GAL)
8	Note hearing date on notices of hearing.
9	Prepare Notice packages:
	a Respondent: <i>noticinc</i>
	<ul style="list-style-type: none"> • Notice of Hearing – MUST BE 14 POINT TYPE • Petition • Order Appointing GAL
	b Family (includes Client) <i>gdn-noticefam</i>
	<ul style="list-style-type: none"> • Notice of Hearing • Petition • Order appointing GAL
	c Cover Letter to CLIENT – they must be at hearing. <i>gdn-petcvltr</i>
	d GAL
	<ul style="list-style-type: none"> • Cover Letter <i>gdn-galcvltr</i> • Notice Hearing – BOTH. (copy cert. Mailing of Family pack) • Petition • Order appointing GAL • Copy of Medical Cert. and Interview form, anything else
10	Obtain PERSONAL service on respondent of their package (GAL can do)
11	Mail Notice Hearing Package to each family member
12	Prepare Certificate of Mailing of Family package to file w/ Court (cc GAL)
13	1 week before Court, double check: <ul style="list-style-type: none"> • Returns, if any, complete (GAL serves respondent) • PRE-FILE Medical Certification, mailing certifications, any document evidence • follow up service return and GAL report; • REMIND WITNESSES
14	2 days before hearing, update draft Order to conform to GAL report. Call client to remind of hearing. If “sure thing” call clerk and surety to place on standby to handle qualification immediately after hearing.
15	Day before, prepare file for Court.
16	Hearing
17	After Order entered, <ul style="list-style-type: none"> • call surety and arrange for bond • Clerk’s info sheet <i>gdn-clerkinfo</i>
18	Go over rules and procedures with client. <i>gdn-consrule</i>
19	<i>Mark follow-up dates on calendar for inventory and first accounting.</i>
20	<i>Send inventory reminder letter and accounting reminder letter 21 – 30 days before due.</i>