

ANNUAL REPORT OF GUARDIAN/CONSERVATOR

For a Minor Only



PINAL COUNTY

ANNUAL REPORT

**FOR GUARDIANSHIP/CONSERVATORSHIP
FILED FOR MINORS ONLY**

INSTRUCTIONS AND FORMS
Provided as a Public Service by
REBECCA PADILLA
Clerk of the Superior Court

**ANNUAL REPORT OF GUARDIAN/CONSERVATOR
FOR A MINOR**

CHECKLIST

USE THE FORMS AND INSTRUCTIONS in this packet only if the following factors apply to your situation:

√ You have been appointed the guardian and/or conservator for a minor,

AND

√ It is the yearly anniversary of the date you were appointed guardian and/or conservator,

AND

√ You need to file the Annual Report of Guardian/Conservator (for a Minor).

READ ME: It is very important for you to know that when you sign a court document, you may be helping or hurting your court case. Before you sign any court document, or get involved with a court case, it is important that you see a lawyer to make sure you are doing the right thing.

ANNUAL REPORT OF GUARDIAN/CONSERVATOR FOR A MINOR

How to assemble these documents:

This packet contains general information and instructions for the Annual Report of Guardian/Conservator for a Minor. Be sure the documents are in the following order:

Order	Title	# of Pages
1	Checklist: Use these forms if...	1
2	Table of Contents (this page)	1
3	Instructions: How to Fill Out “Annual Report of Guardian/Conservator for a Minor”	2
4	“Annual Report of Guardian/Conservator for a Minor”	4
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You have permission to use these documents for any lawful purpose. These forms shall not be used to engage in the unauthorized practice of law. The Court assumes no responsibility and accepts no liability for actions taken by users of these documents, including reliance on their contents. The documents are under continual revision and are current only for the day they were received. It is strongly recommended that you verify on a regular basis that you have the most current documents.

INSTRUCTIONS

How to Fill Out the Annual Report of the Guardian/Conservator for a Minor

USE THIS PACKET if you have been appointed as the Guardian and/or Conservator for the Minor and it has been a year since your appointment. You must complete this form every year you are the Guardian and/or Conservator for the Minor on or before the anniversary date of your *letters of appointment* as Guardian/Conservator. Follow these steps to complete this form:

STEP 1: Complete the Annual Report of Guardian/Conservator for a Minor.

Use Black Ink Only!

Write the Following Information:

- Next hearing date.
- The name of the Minor (the person you are the Guardian/Conservator for).
- The Minor's date of birth, address and telephone number.
- The name of the Guardian/Conservator.
- Guardian's/Conservator's address, telephone number and email address.
- The name of the Minor's Physician.
- The Physician's address and telephone number.

Complete the Following: (Section # 1)

- Describe where the Minor lives (not the address). Things to include would be whether it was a private home, boarding home, or nursing home. How many people live in the Minor's room? Who looks after the Minor, and so forth, **AND**
- The name of the person in charge or the name of the place where the Minor lives, the address, and the telephone number.

Confidential Information: (Section # 2)

SPECIAL HANDLING REQUIRED:

Give the following information about the Minor's physical and mental health:

- Write in the date the Minor was last seen by a doctor,
- Describe any changes in the Minor's health, **AND**
- Make sure you attach a current copy of the doctor's report about the Minor's current physical and mental health.

Information about the Minor's Education: (Section # 3)

- Name of the School District and school, along with address.
- Last Grade completed.
- Describe Minor's school experience. (grades, relationships, behavior)

Information about the Guardianship/Conservatorship: (Section # 4)

- Write in the number of times you have seen the Minor in the last 12 months, and the date of your last visit.
- Then tell the Judge/Commissioner whether or not you think the guardianship /

conservatorship should continue and the reasons it should or should not continue.

Information about State, County, Federal Agency Services: (Section # 5)

- If the Minor receives any state, county or federal agency services, write in the name of the agency, and describe the services the Minor receives. If the Minor does not receive any services, check **NO**.

Information about the Person Responsible for the Minor's Assets: (Section # 6)

- Write in the name, address, and telephone number of the person responsible for the Minor's assets. If the Minor does not have any assets, then write in N/A for not applicable.

Signature: (Section # 7)

- Make sure you date the document and sign and print your name.

Mailing Affidavit: (Section # 8)

- Write the names and addresses of the people to whom you mailed a **copy** of the ANNUAL REPORT and the date you mailed them. Then sign your name to show that you mailed the document.

STEP 2: Read Procedures: *How to File the Annual Report of the Guardian/Conservator for a Minor.*

Name of Person Filing: _____
 Street Address: _____
 City, State, Zip Code: _____
 Telephone Number: _____
 Email Address: _____
 Representing Self (No Attorney) or Represented by Attorney
 If Attorney, Bar Number: _____

**SUPERIOR COURT OF ARIZONA
 PINAL COUNTY**

In the Matter of (check one or both)
 Guardianship
 Conservatorship

CASE NUMBER: S1100
 ANNUAL REPORT OF
 GUARDIAN/CONSERVATOR (MINOR)
 PERIOD FROM _____ TO _____
MO DAY YR MO DAY YR

 Name of Minor

HONORABLE: _____

Instructions to Guardian/Conservator: Arizona law (A.R.S. 14-5315) requires every guardian/conservator of a minor to advise the Court each year regarding the Minor. Please complete this report each year on the anniversary date of your appointment as guardian/conservator. When complete, mail the report to: Pinal County Superior Court Clerk, PO Box 2730, Florence AZ 85132. You must also mail a copy of the report to anyone else who has appeared in the case. You must mail a copy to the Minor, if he or she is at least 14 years old. You must also fill out the Affidavit of Mailing at the end of the report to show the names and addresses of all the people to whom you mailed the report and the date on which you mailed it. (If necessary, additional pages may be attached.)

Next Hearing Date: _____
 Name of Minor: _____
 Minor's Address: _____
 Minor's Birth Date: _____ Telephone Number: _____
 Name of Guardian/Conservator: _____
 Guardian's/Conservator's Address: _____
 Guardian's/Conservator's Telephone Number: _____ Email: _____
 Minor's Current Physician: _____
 Physician's Address: _____
 Physician's Telephone Number: _____

INFORMATION ABOUT THE ABOVE-NAMED MINOR:

1. Describe the Minor’s current residential situation (private home, boarding home, nursing home, etc.):

Name and Address of Facility:

Name and Telephone Number of Person in Charge:

2. Date the Minor was last seen by a physician: _____

Filed herewith a copy of the physician’s report on minor’s current physical & mental condition.

List any major changes to the Minor’s physical and/or mental condition that occurred within the last year:

3. Information about the Minor’s Education.

a. Name of School District: _____

b. Name/Address of School: _____

c. Last Grade Completed: _____

d. Describe Minor’s School Experience: (grades, relationships, behavior)

4. Number of Times Guardian/Conservator has seen the Minor in last 12 months: _____

Date of Last Visit: _____

Should Guardianship/Conservatorship be continued? YES NO

Why? (Guardian’s/Conservator’s Opinion):

5. Does the Minor receive any state, county or federal agency services? YES NO
If so, specify type of services and the name of the person within that agency whom the Minor is in contact:

NOTE:

If this is a Conservatorship Action, Attach an Annual Accounting/Status Report of the Minor's Assets.

6. Name, Address, and Telephone Number of person responsible for managing the Minor's assets:

NOTICE TO GUARDIAN/CONSERVATOR: A guardian or conservator appointed pursuant to Title 14, Chapter 5 SHALL provide a written notice to the court disclosing the date of death of a Minor or protected person within TEN (10) days after learning of the Minor or protected person's death. Further, a conservator SHALL file a final accounting with the court within NINETY (90) days after the Minor's or protected person's date of death.

7. Signed this _____ day of _____, 20_____.

Printed Name of Guardian/Conservator

Signature of Guardian/Conservator

8. **AFFIDAVIT OF MAILING:** I promise I mailed this Annual Report of Guardian / Conservator to the following people at the following address(es) on this date: _____

(Month/Day/Year)

- Name: _____
Address: _____

City, State, Zip Code: _____

• Name: _____
Address: _____
City, State, Zip Code: _____

• Name: _____
Address: _____
City, State, Zip Code: _____

• Name: _____
Address: _____
City, State, Zip Code: _____

(Signature)

(Date)

Sworn to or Affirmed before me this: _____ by _____
(Date)

My Commission Expires: _____
(Deputy Clerk or Notary Public)

HOW TO FILE

Annual Report of Guardian/Conservator for a Minor

USE THIS PACKET if you have been appointed as guardian and/or conservator for a Minor and it has been a year since your appointment.

WHEN AND HOW TO FILE THE ANNUAL REPORT:

STEP 1: The guardian and/or conservator for the Minor must complete the ANNUAL REPORT every year, on or before the anniversary date of your appointment as guardian and/or conservator for the Minor.

NOTE: If you fail to file the report and/or fail to appear at the review hearing, the Court may set up an “Order to Show Cause” hearing.

STEP 2: Complete the ANNUAL REPORT in **Black Ink**. Answer all of the questions. Make copies of the annual report according to who needs to receive a copy of the Annual Report:

- The Minor, if over 14 years of age
- The Minor’s Conservator (if applicable)
- The Minor’s parents
- The Attorney for the Minor (if applicable)
- Any other interested person who has filed a demand for notice with the Court

Keep a copy of the ANNUAL REPORT for yourself with a list of the people to whom you mailed the ANNUAL REPORT.

STEP 3: File the **ORIGINAL** Annual Report with The Court Through the Following:

IN PERSON: Bring the **original and copies**, to the Clerk of Court. You should go to the Court **at least two hours before it closes**. You may file your court papers at the following Pinal County Superior Court locations:

Visit our website for office locations or feel free to give us a call.

Contact Information for all Offices

Toll Free: 888.431.1311 • 520.509.3555 or 311 • 520.866.5320

www.coscpinalcountyaz.gov/office.html

BY MAIL: If you cannot or do not want to file the original report in person, you can also mail the original and copies of the Annual Report to the Superior Court. Include a self-addressed stamped envelope so that the Clerk can return your stamped conformed copies to you.

CLERK OF THE SUPERIOR COURT

PO Box 2730
Florence AZ 85132

STEP 4: The Clerk's office will file the original Annual Report and stamp your copies. The copies will be returned to you and you are to mail a **copy** of the ANNUAL REPORT to any interested person.

CHANGE OF ADDRESS:

STEP 5: GUARDIAN/CONSERVATOR'S CHANGE OF ADDRESS: If you have been appointed Guardian and/or Conservator, you must list your address in the initial Petition and you must **immediately** notify the Clerk of the Court in writing if your mailing address changes during the term of your appointment. Your notice of change of address must contain the case number(s) of the case(s) in which you have been appointed.

STEP 6: MINOR'S CHANGE OF ADDRESS: If you have been appointed as a Guardian and/or Conservator, you must notify the Clerk of the Court in writing within **3 Days** of the change in the address of a Minor or Protected Person. The Notice must contain the case number and the Minor's or Protected Person's new address. All written Notices may be delivered personally or can be mailed to the Court at the address given above.