

Checklist for Guardian Advocacy Cases

Main documents (Pleadings) needed:

1. _____ Application for Appointment as Guardian Advocate
2. _____ Notice of Petition for the Appointment of Guardian Advocate
3. _____ Notice of Confidential Information within Court Filing
4. _____ Notice of Filing Social/Medical History Documents
5. _____ Petition for Appointment of Guardian Advocate
6. _____ Oath of Guardian Advocate, Designation of Resident Agent & Acceptance
7. _____ Designation of Email Address, Primary Address for Service of Papers and notice of Current Residence Address
8. _____ Annual Report Dates Reference Sheet
9. _____ Petition/Motion for Order Waiving Education and Financial Reporting and to Waive Credit and Criminal background Check

DO YOU HAVE A CO-GUARDIAN?

Co-Guardian Documents:

10. _____ Notice of Joint Petition for Co-Guardian Advocacy
11. _____ Application for Appointment as Co-Guardian Advocate
12. _____ Petition for Appointment of Co-Guardian Advocate
13. _____ Oath of Co-Guardian Advocate, Designation of Resident Agent & Acceptance
14. _____ Designation of Email Address, Primary Address, Notice of Current Address

The following are documents which are needed, but later on in the process, meaning they are not filed with the initial filing:

15. _____ Initial Guardianship Plan
16. _____ Annual Plan (including Dr. Report)

You might also need additional forms which are on the website:

- A. Order Appointing Attorney and Elisor for Proposed Ward
- B. Order Appointing Guardian Advocate(s)
- C. Letters of Guardianship
- D. Order Approving Initial Plan
- E. Order Approving Annual Plan

Notes: Write down case number if you have it, the date of filing, and any other pertinent information.
