

Guardian of Estate

The following instructions are provided as a general guideline to help persons who have been appointed Guardian of the Person of an Adult Incompetent. These instructions are not comprehensive and may not apply in every case.

*****The employees of this Court are not permitted to give legal advice. This means they cannot give you advice that is specific to your case and cannot help you fill out forms.*****

If you need case-specific advice or help filling out forms, you are strongly encouraged to speak with an attorney who is experienced in guardianship matters.

INSTRUCTIONS

- Write the ward's name on the "GUARDIANSHIP OF" blank and the case number on the "CASE NO." blank at the top of each form. If the Judge's name is not filled in, write "KAREN K. GALLAGHER" on each form. Complete the rest of the form as instructed below.
- The Court will fill in blanks for hearing dates and times as well as the signatures for Judge, Magistrate, or other Court Employees.

Guardian's Inventory	Form 15.5	You must file this form within 90 days of your appointment as guardian. Provide the requested information and sign on the Guardian's Signature line.
Application to Release Funds to Guardian	Form 15.6	You must file this form and receive an Order Authorizing Release of Funds before you access the ward's funds. Provide the requested information and sign on the Guardian's Signature line.
Application for Authority to Expend Funds	Form 15.7	You must file this form and receive an Entry Authorizing Expenditure of Funds before you spend the ward's funds. Check the appropriate boxes and provide the requested information. Sign on the Guardian's Signature line.
Guardian's Account	Form 15.8	You must file this form within 2 years of your appointment as guardian and every other year after. Provide the requested information and sign on the Guardian's Signature line. Attach receipts, Bank statements, and Bank Certificates.
Entry Approving and Settling Account	Form 13.3	You must file this form with the Guardian's Account every year. Provide the case name and number. Leave the rest of the form blank.
Annual Guardianship Plan of Estate	Form 27.8	You must file this form every year. Check the appropriate boxes and provide the requested information. Sign on the Guardian's Signature line.

The link to the Forms can be found on our Website:

<https://www.williamscountyoh.gov/667/Probate-Forms>

Or on the Supreme Court of Ohio Website:

<https://www.supremecourt.ohio.gov/forms/all-forms/probate/5>