

Cause No.: _____

In the Matter of

In County Court at Law

The Guardianship of

No. _____

_____, Ward

Cameron County, Texas

GUARDIAN'S INITIAL ANNUAL FINAL

REPORT ON THE CONDITION AND WELL-BEING OF A WARD

FOR THE PERIOD _____ THROUGH _____

Check one: Guardianship of Person Only Guardianship of Person and Estate

Please fill out this form completely, answering every question, except when directed otherwise. "Not applicable" is not a proper response and can delay processing and approval.

On this day, the undersigned, known to me to be the Guardian in this matter, personally appeared before me, and after being duly sworn, stated the following:

1. WARD: Name _____ Age ___ DOB _____
Address (no P.O. Box) _____
City/State/Zip _____
Phone _____

2. GUARDIAN(s): Guardian's Name _____
Co-Guardian's Name _____
Age(s) _____ / _____ DOB(s) _____ / _____
Address (no P.O. Box) _____
City/State/Zip _____
Phone No. _____
Relationship to Ward _____

During the past reporting year, have you been convicted of a felony or a misdemeanor other than a minor traffic offense? YES NO If YES, explain _____

7. All guardians **must** report on the amount and source of the Ward's income, regardless of whether the income comes to someone other than the guardian (such as the Ward's residence). Note that Social Security benefits are considered income, but that child support is not.

A. Source of Ward's income: _____

B. **Annual** amount of Ward's income: _____ (monthly x 12)

If zero, explain: _____

8. In addition to the Guardian of the Person, is there a **Court-appointed** Guardian of the Ward's **estate**?

Yes No Note: just because you are the Representative Payee does not necessarily mean there is a guardianship of the estate.

Depending on your answer, please answer the questions in only one of the boxes below:

A. If there is NOT a Guardian for the Ward's estate, please answer the following questions and attach additional information as directed:

1). Has a Court Order directed you to manage any funds of the Ward **other than Social Security funds**? Yes No

→ **If YES, you MUST report on your management of those funds by attaching an income and expenses worksheet to this Annual Report.**

2). Are you the **representative payee** of the Ward's Social Security Disability (SSI) or Social Security Retirement Benefits (SSA)? Yes No

→ **If YES, you MUST attach** to this Annual Report either:

1. A letter of the Ward's Social Security benefits.

Or

2. A copy of your most recent Representative Payee Report provided by the Social Security Administration.

OR

B. If there IS a Guardian for the Ward's estate, please answer the following two questions:

1). Are you the Guardian for the Ward's estate? Yes No

2). Do you as Guardian of the Person receive an allowance from the Guardian of the Estate?
 Yes No

If YES, annual amount of allowance received _____

Has the Court approved a formal “Case Management Agreement” for case management services to the Ward? A Case Management Agreement is a signed contract with a professional case manager *that has been formally approved by the Court.* (This is not the same as a “Care Plan” from a medical provider.)

Yes No

→If YES, you MUST attach an updated copy of the case manager’s care plan for the Ward for the Court’s approval.

10. During the past year ward has been treated or evaluated by the following professionals.

As a guardian, it’s your duty to know this information and to provide the information to the Court even if the Ward’s residential facility arranges the services.

Physician Name: _____

Describe: _____

Does the Ward see this doctor on a regular basis? Yes NO

Psychiatrist Name: _____

Describe: _____

Social Worker or other Case Worker Name: _____

Describe: _____

Dentist Name: _____

Describe: _____

Other Name: _____

Describe: _____

11. Social Conditions: During the past year the ward has participated in the following activities.

Note that for each type of activity checked, you must describe the activities (e.g., movies, bowling, Special Olympics, church, eating out, etc.). Don’t leave blank or simply write the name of the residential facility.

Recreational: _____

Educational: _____

- Social: _____
- Occupational: _____
- None available.
- Refuses or is unable to participate.

12. During the past year the ward's mental health has:

- Remained about the same
- Improved. Describe: _____
- Deteriorated. Describe: _____

13. As Guardian of the Person, I HAVE FILED HAVE NOT FILED for **Emergency Detention of the Ward** pursuant to the Texas Health & Safety Code. (An example of emergency detention is a request for an emergency hospitalization of the Ward for mental health or safety reasons.) If you answered HAVE FILED, please list the number of times and the dates: _____

14. During the past year the ward's physical health has:

- Remained about the same
- Improved. Describe: _____
- Deteriorated. Describe: _____

15. As guardian, I believe the Ward's living arrangements are Excellent Average Below average

If below average, explain: _____

16. As guardian, I believe that my ward is

- Happy/Content with living situation
- Unhappy with living situation

17. As guardian I believe my ward DOES DOES NOT have unmet needs.

(Unmet needs = problems with food, shelter, medical care)

If you answered DOES, please explain: _____

18. The power authorized by this guardianship should be:

- Unchanged
- Decreased Explain: _____
- Increased Explain: _____

19. **Guardian’s Bond:** Check the appropriate box below, adding an explanation if requested.

Note: Even if Ward’s residential facility pays your bond premium for you, it is your responsibility to verify that the bond payment is current and then mark “have paid.” If you are not sure, you can look for a statement that the premium was paid on one of the accountings the facility sends you, or you can call the facility and ask.

- I **HAVE PAID** the bond premium for the next reporting period.
- I **HAVE NOT PAID** the bond premium for the next reporting period (Explain): _____
- I have a **CASH BOND** on file with the Court _____
- I am **not required to pay** a bond premium because _____
- I have a **Personal Recognizance Bond** _____
- I have a **Surety Bond** _____

20. If possible, **please** attach a current photograph of the ward.

21. Please state any additional information concerning the ward that you would like to share with the Court:

22. Would you want fresh "Letter of Guardianship" once the report is approved? Yes NO

If "yes," fill out the request form provided at the County Clerk's Office. Letters are not sent automatically; you must complete and submit the following form for the clerk's office to issue Letters.

If you want fresh Letters, please note two additional things:

1.) If you want fresh Letters of Guardianship, there may be fees required by the clerk. You can call the County Clerk's to verify: (956) 544-0867.

2.) If there is also a guardianship of the estate, new Letters cannot be issued until the annual account is approved.

Complete the following:

I, _____, the guardian of the person and estate for _____,
(insert name of guardian of the person) (insert name of ward),

in Cameron County Texas, declare under penalty of perjury that the foregoing is true and correct.

Executed on _____ 20_____ X _____
Guardian's Signature

If this report is for Co-Guardians, also complete the following:

I, _____, the guardian of the person for _____,
(insert name of co-guardian of the person) (insert name of ward),

in Cameron County Texas, declare under penalty of perjury that the foregoing is true and correct.

Executed on _____ 20_____ X _____
Co-Guardian's Signature (if any)

NOTARIZATION OF SIGNATURE:

**SUBSCRIBED AND SWORN TO BEFORE ME ON _____, to certify which witness my
(DATE)
hand and seal of office.**

Mail to:
Cameron County Clerk's Office
974 E. Harrison
Brownsville, TX 78520
(Or this form can be electronically filed with the Clerk's Office.)

X _____
NOTARY PUBLIC, State of Texas