Tabzoola

Guardianship Binder Checklist

What a guardian or conservator keeps for the court, in the order the annual report needs it.

Case / client: _____ Date: _____

- [ ] Court order of appointment and letters of guardianship or conservatorship
- [ ] Court case number, judge, clerk and attorney contacts
- [ ] Ward information: ID, Social Security and insurance cards (copies)
- [ ] Family, caseworker and emergency contact list
- [ ] Care plan and living arrangements
- [ ] Doctors, pharmacy, care providers and medication list
- [ ] Medical records, consents and visit notes
- [ ] Inventory of assets filed with the court
- [ ] Income and benefits: Social Security, pension, Medicaid, VA
- [ ] Bank statements for the guardianship account
- [ ] Expenses paid and the receipts behind them
- [ ] Court reports, annual accountings and filing deadlines

TAB IT: Tabzoola's 8-tab set for this binder

Court Orders & Letters · Ward Information · Care Plan · Medical & Care Providers · Assets & Inventory · Income & Benefits · Expenses & Receipts · Court Reports & Accountings

Printed on the tabs, collated and 3-hole punched with clear Mylar on every tab: 25 sets are $204.30 ($8.17 a set), every section renamed to yours at no extra cost, with a free PDF proof before anything prints.

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An organizing aid, not legal or financial advice. Follow your court's rules and your firm's procedures.