

# IMPORTANT INFORMATION ABOUT YOUR DUTIES AS A GUARDIAN

## 20 Pa.C.S.A. § 5521

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**ONCE YOU ARE APPOINTED GUARDIAN OF THE ESTATE, YOU ARE REQUIRED TO:**

1) file a report, within the first 12 months of your appointment **and** annually thereafter, attesting to the following:

(i) **Guardian of the estate:**

- (A) current principal and how it is invested;
  - (B) current income;
  - (C) expenditures of principal and income since the last report; and
  - (D) needs of the incapacitated person for which the guardian has provided since the last report.
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**ONCE YOU ARE APPOINTED GUARDIAN OF THE PERSON, YOU ARE REQUIRED TO:**

1) file a report, within the first 12 months of your appointment and annually thereafter, attesting to the following:

(ii) **Guardian of the person:**

- (A) current address and type of placement of the incapacitated person;
- (B) major medical or mental problems of the incapacitated person;
- (C) a brief description of the incapacitated person's living arrangements and the social, medical, psychological and other support services he is receiving;
- (D) the opinion of the guardian as to whether the guardianship should continue or be terminated or modified and the reasons therefor; and
- (E) number and length of times the guardian visited the incapacitated person in the past year.

**2) within 60 days of the death of the incapacitated person or an adjudication of capacity and modification of existing orders, the guardian shall file a final report with the court.**

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You may find these forms on the county website [www.northamptoncounty.org](http://www.northamptoncounty.org) , then choose the following:

- > County Government
- > Court Services
- > Orphans Court
- > Guardianships (Here you will find reports for Guardian of the Estate and the Person)