

# Rule 5.695. Annual Guardianship Report

## **(a) Contents and Filing.**

**(1) Guardian of the Person.** Unless the court requires reporting on a calendar-year basis, the guardian of the person shall file an annual guardianship plan within 90 days after the last day of the anniversary month in which the letters of guardianship were signed. The plan must cover the coming fiscal year ending on the last day of such anniversary month. If the court requires calendar-year reporting, the guardianship plan for the forthcoming year must be filed on or before April 1 of each year.

**(2) Guardian of the Property.** Unless the court requires or authorizes reporting on a fiscal year basis, the guardian of the property shall file an annual accounting on or before April 1 of each year. The annual accounting shall cover the preceding annual accounting period. If the court requires or authorizes reporting on a fiscal year basis, the annual accounting shall be filed on or before the first day of the fourth month after the end of the fiscal year.

**(b) Service.** Copies of the annual plan and accounting shall be served on the ward, unless the ward is a minor or is totally incapacitated, and the attorney for the ward, if any. With the approval of the court, service on the ward may be accomplished by serving the attorney for the ward. The guardian shall serve copies on such other persons as the court may direct.