

## **10 Tips for Family and Non-Professional Guardian**

The information below is basic tips and is not a substitute for through guardianship training.

1. Maintain separate financial accounts
  - a. Maintain separate bank or brokerage accounts titled as instructed by the court or your attorney and keep the individual's money in a separate place. Keep personal property and valuables apart from your own. Most important: never borrow or lend the person's money or property without approval from the Court.
2. Keep detailed records
  - a. Save receipts for everything you can, and write every expenditure or decision down. Keep notes for every conversation or visit, even if the notes are very simple. It is important to create a record of what you have done to help the person. These records are essential in filing reports and responding to any questions about your actions.
3. Only use the persons' money and property for their benefit
  - a. The income, money, and property of the person should be used to meet the needs of the person and to provide for the best quality of life possible for the person. Do not use the money to support others without consulting the Court.
4. File timely reports
  - a. After appointment, the Pinellas County of the Court will forward a Guardianship Filing Schedule will forward the filing deadlines for the guardianship reports and the type of reports. Request your attorney advise you on what needs to be in the reports, how to file them and when they are due. Always carefully prepare and file all reports on time.

5. Regularly talk with the person and other interested family and friends
  - a. It is important for the Guardian to respect a person's privacy and dignity and the guardian shall keep the affairs and medical issues of the person confidential. To the extent possible, the guardian shall consult with the person to determine their privacy preferences. It is important to maintain communication with friends and family and when a person is totally or partially unable to express their wishes, seek input from friends or family to determine what the ward would have wanted. If there is conflict or concern about information that is appropriate to share with friends or family, the Guardian should seek guidance from their legal counsel and/or the court. The Guardian should document all communication and information gathered from the person, friends or family.
  
6. Spend time together
  - a. Time spent together will result in better quality of life and a better experience for both of you.
  
7. Provide social contact
  - a. Restricting visits or isolating the person from family and friends is harmful and threatens an individual's quality of life. Find opportunities for valuable interaction. The more interaction a person has, the more likely it is that a family or friend can spot any potential health care issues, financial or abuse threats, and help avoid or remedy them.
  
8. Remember the dignity in choice
  - a. There is dignity in choice. Safeguarding from unreasonable risk does not require elimination of all choices. Create an opportunity for the person to make choices that carry little risk, such as choices about clothing, food, and interactions with family.
  
9. Safeguard the person's rights

- a. As a guardian, your role is to protect the person's rights. Help the person exercise their rights to the greatest extent possible.

#### 10. Reassess the Need to Continue the Guardianship

- a. If the guardianship was the result of an illness or injury, the person may recover. Look at the PRACTICAL Guide to help review the need for guardianship.

[https://www.americanbar.org/groups/law\\_aging/resources/guardianship\\_law\\_practice/practical\\_tool/](https://www.americanbar.org/groups/law_aging/resources/guardianship_law_practice/practical_tool/)

#### Additional Resources

- National Center on Law and Elder Rights: Overview of Guardianship Webcast
- ABA Commission on Law and Aging: Guardianship and Supported Decision Making
- Quality Trust for Individuals with Disabilities
- Burton Blatt Institute