

Guardian Advocacy Forms

Table of Contents

- A. Petition for Appointment of Guardian/Co-Guardian Advocate(s)
- B. Application for Appointment as Guardian/Co-Guardian Advocate(s)
- C. Application for Determination of Civil Indigent Status (Clerk's Form)
- D. Waiver and Consent to Appointment of Guardian/Co-Guardian Advocate(s)
- E. Oath of Guardian/Co-Guardian Advocate, Designation of Resident Agent and Acceptance
- F. Notice of Confidential Filing Information
- G. Notice of Filing
- H. Receipt of Fingerprinting for Background Check
- I. Email Designation

5. (Ward's full name) _____ is a person with a developmental disability, who was born on _____, and who is _____ Years of age. The Ward's primary spoken language is _____ and the last four digits of the Ward's Social Security number is XXX-XX-_____

The Ward resides in _____ County, Florida, and his/her residential address is: _____ and his/her mailing address is: _____.

6. The Ward's next of kin is/are: (include names and addresses of any non-petitioning spouse, parent, and any adult siblings):

7. The Petitioner(s) believe that the Ward is in need of a Guardian Advocate due to his/her developmental disability which manifested itself prior to the age of eighteen (18), specifically (choose all that apply):

- intellectual disability. Specify Type if Known: _____
- cerebral palsy
- autism
- Spina Bifida
- Prader-Willi syndrome
- Down syndrome
- Phelan-McDermid syndrome

As a result of the above selected condition, the Ward lacks the decision-making ability to do some of the tasks necessary to care for his or her person or property and all medical probability indicates that this condition can reasonably be expected to continue indefinitely.

8. The Petitioner(s) believe(s) a Guardian Advocate is necessary because the Ward lacks the decision-making ability to make informed decisions about the Ward's own person, specifically the following rights: (check all which apply)

Person, Delegable

- To determine residence
- To consent to medical treatment
- To make decisions about environment or other social aspects of life

Property, Delegable

- To contract
- To sue and defend lawsuits
- To manage property and income or make any gift or disposition of property
- To apply for government benefits

Person, Non-Delegable

- To marry
- To vote
- To have a driver's license
- To travel

Property, Non-delegable

- To seek and retain employment

9. Petitioner(s) is/are willing and able to act as Guardian Advocate for the Ward, and should be appointed as Guardian Advocate because Petitioner(s) is/are the Ward's _____ (insert relationship to Ward), is willing to serve in that capacity, and is best qualified to act on the Ward's behalf.

10. In accordance with Probate Rule 5.649(a)(7), Petitioner(s) has/have knowledge, information or belief that the Ward HAS/ HAS NOT created an advanced directive, Health Care Surrogate or a durable power of attorney.

11. The Petitioner(s) further state(s) that the Ward is is not indigent. If the ward is indigent and having no assets and no income other than public assistance and requests that the Court waive all costs incurred commencing this case and direct the Clerk of the Circuit Court to void all charges related to same. If the Ward is indigent, an Application for Determination of Indigent Status must be filed with this Petition. See Form C.

12. Petitioner(s) file(s) with this Court his/her/their Application(s) for Appointment as Guardian Advocate in conjunction with this Petition.

13. After the Petition is filed, the Petitioner(s) will follow the instructions for a criminal background check using the code ORI#FL052104Z to order a copy of the results of the background check to be delivered to the Clerk of the Court.

WHEREFORE, The Petitioner(s) request(s) this Court set a hearing to inquire into the Decision-making Ability of the Ward, and should the Court determine it is appropriate to do so, enter an Order appointing the Petitioner(s) as Guardian Advocate(s) for the Ward.

The Petitioner(s) further request(s) that this Court allow the Guardian Advocate(s) to file a Case Plan in the form of an Individual Education Plan (IEP), Support Plan, Habilitation Plan, a report from Agency for Persons with Disabilities or a Simplified Guardian Advocate plan, in lieu of the filing of an Initial Plan and Annual Plan, including a physician's report.

The Petitioner(s) further request(s) that this Court allow the Guardian Advocate(s) to file an Affidavit annually stating where the Ward resides and that the funds the Ward receives are used for care maintenance and support of the Ward, if applicable.

Under penalties of perjury, I/We declare that I have read the foregoing, and the facts alleged are true, to the best of my knowledge and belief.

Executed this _____ day of _____, 20____.

Signature _____

Name _____

Address _____

Phone _____

E-mail address _____

(Petitioner)

(If co-Guardians, both sign)

Executed this _____ day of _____, 20____.

Signature _____

Name _____

Address _____

Phone _____

E-mail address _____

(Co-Petitioner)

FORM B

IN THE CIRCUIT COURT OF THE SIXTH JUDICIAL
CIRCUIT FOR PINELLA COUNTY, FLORIDA
Guardianship Division

IN RE: GUARDIAN ADVOCACY OF

Case No. _____

Alleged Person with a Developmental Disability

_____ /

APPLICATION FOR APPOINTMENT AS GUARDIAN OR GUARDIAN ADVOCATE

Pursuant to Sections 744.3125 and 393.12 of the Florida Statutes, the undersigned submits this Application for Appointment as Guardian or Guardian Advocate of _____ and submits the following information (whenever the space provided is insufficient, attach additional pages):

1. Applicant's Full Name:

2. Specify Applicant's relationship with the alleged incapacitated person/developmentally Disabled person (or Ward):

_____.

3. Applicant's Social Security Number: _____ - _____ - _____

4. Date and place of birth: _____

5. Residence address: _____
Street City State Zip

6. Mailing address _____
Street City State Zip

7. E-mail address: _____

8. U.S. citizen? Yes No

9. Employer's name and address:

Name Street City State Zip
(If self-employed provide corporate or d/b/a title)

• Applicant's position: _____

• Professional license number (if any): _____

10. Please specify if:

Unemployed Yes No Retired Yes No Homemaker Yes No

11. Marital status: Married Divorced Single

If married, name of spouse: _____

12. Home telephone number: _____

13. Length of residence in county where application is filed: _____

14. Do you serve as Guardian for another ward? Yes No

15. If Yes, provide Ward(s) information below:

Ward #1

Name of Ward: _____

Case number: _____

Circuit Court: _____

Guardianship type: Plenary Limited Guardian Advocacy

Ward #2

Name of Ward: _____

Case number: _____

Circuit Court: _____

Guardianship type: Plenary Limited Guardian Advocacy

16. Are you a Professional Guardian registered with the Office of Public and Professional Guardians?

Yes No If Yes, then attach a complete list of your current wards, location of guardianship and case number to this application.

17. Does the Applicant have any physical disabilities? If yes, describe and state whether they may affect to any extent the Applicant's ability to serve as a guardian.

Has applicant ever been diagnosed with and treated for any of the following:

a. Mental illness? Yes No

If yes, provide date, location of treatment, any voluntary or involuntary hospitalizations, name of treating physician or professional, and specify if psychotropic medication was prescribed and if Applicant is compliant with the prescribed medication regimen:

Date	Location	Name of treating physician/professional
------	----------	---

b. Alcohol abuse? Yes No

If yes, provide date, location of treatment, and name of treating physician or professional.

Date	Location	Name of treating physician/professional
------	----------	---

c. Drug abuse? Yes No

If yes, provide date, location of treatment, and name of treating physician or professional:

Date	Location	Name of treating physician/professional
------	----------	---

d. Other? Yes No

If yes, describe condition, provide date, location of treatment, and name of treating physician or professional:

Date	Location	Name of treating physician/professional
------	----------	---

e. Do you own or possess any firearms? Yes No

If so, describe your safety procedures and/or precautions: _____

18. Has Applicant ever been charged with fraud, misrepresentation or perjury in a judicial or administrative proceeding? Yes No

If yes, please give date(s) and complete details:

19. Has applicant even been the subject of a confirmed report or judicial determination of abuse, neglect or exploitation of a child, vulnerable adult or elderly person which is prohibited under the provisions of Sections 435.04, 39.01? 984.02 Or 984.03(1), (2), or (37)?

Yes No

If yes, please give date(s) and complete details:

19 a. Has Applicant ever been arrested for or charged with a Felony? Check yes even if the record of your conviction was expunged, unless it was expunged pursuant to section 943.0583, Florida Statutes

Yes No

If yes, specify type of offense, location, and final disposition:

b. Has Applicant ever been convicted of or entered a plea of guilty or no contest to a felony? Check yes even if the record of your conviction was expunged, unless it was expunged pursuant to section 943.0583, Florida Statutes Yes No

If yes, specify type of offense, location, and final disposition:

c. Has applicant ever been arrested for or charged with any crime other than a Felony? Check yes even if the record of your conviction was expunged, unless it was expunged pursuant to section 943.0583, Florida Statutes Yes No

If yes, specify type of offense, location, and final disposition:

d. Has Applicant even been convicted of, entered a plea of guilty or no contest to any crime Other than a felony? Check yes even if the record of your conviction was expunged, unless it was expunged pursuant to section 943.0583, Florida Statutes Yes No

If yes, specify type of offense, location, and final disposition:

20. Has Applicant ever held a position which required bonding?

Yes No

21. Has Applicant ever been removed from a position of Guardian, Agent under a Power of Attorney, Trustee or other fiduciary position for cause?

Yes No

If yes, describe and specify the reason for termination of fiduciary position:

22. Has Applicant ever been held in contempt of court or removed as a guardian or other fiduciary petition by a court?

Yes No

If yes, identify the court, case name and case number and specify the reason(s):

23. Has Applicant ever filed for Bankruptcy?

Yes No

If yes, specify date and location of court:

24. Is Applicant or Applicant's business, corporation or other business entity a creditor of, or providing professional, personal or business services to the alleged incapacitated person (or Ward)?

Yes No

If yes, furnish details:

25. Is Applicant employed by a business or corporation that provides professional, personal or business services to the alleged incapacitated person (or Ward)? Yes No

If yes, furnish details:

26. Is Applicant a licensed health care provider for the alleged incapacitated person (or Ward)?

Yes No

If yes, furnish details:

27. List Applicant's educational history (If needed, insert more pages):

School #1

Name of School/College/Other:

Address:

Street

City

State

Zip

Date degree conferred: _____

Degree: _____

School #2

Name of School/College/Other:

Address:

Street

City

State

Zip

Date degree conferred: _____

Degree: _____

School #3

Name of School/College/Other:

Address:

Street

City

State

Zip

Date degree conferred: _____

Degree: List Applicant's employment history for the past five years in reverse chronological order (If needed, insert more pages):

Employer #1

Name of Company:

Address:

Street

City

State

Zip

Beginning date: _____

Ending date: _____

Reason for leaving:

Employer #2

Name of Company:

Address:

Street

City

State

Zip

Beginning date: _____

Ending date: _____

Reason for leaving:

Employer #3

Name of Company:

Address:

Street

City

State

Zip

Beginning date: _____

Ending date: _____

Reason for leaving:

28. Has Applicant ever been discharged from employment? Yes No

If yes, provide explanation:

29. Has Applicant ever been a member of the armed forces of the U.S.? Yes No

If yes, provide the following information:

Branch: _____

Release date: _____

Military Serial #: _____

30. Provide the names, addresses, and telephone numbers of three responsible persons (excluding relatives or spouse) who have been closely associated with Applicant and who have known Applicant for at least five years:

Reference #1

Name of referee:

Address:

Street	City	State	Zip
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Telephone #:

Number of years known: _____

Reference #2

Name of referee:

Address:

Street	City	State	Zip
--------	------	-------	-----

Telephone #:

Number of years known: _____

Reference #3 Name of referee:

Address:

Street	City	State	Zip Telephone
#:			

Number of years known: _____

31. Does Applicant have any special educational qualifications (financial, business, or other) that uniquely qualify Applicant to be appointed as guardian? Yes No

If yes, describe the qualifications:

32. Has Applicant complied with the guardian education requirements set forth in section 744.3145, Florida Statutes? Yes No

If yes, indicate when and where the training was received:

UNDER PENALTIES OF PERJURY I declare that I have read the foregoing application and the facts alleged are true, to the best of my knowledge and belief.

Date Signed by Applicant: _____

Applicant's Signature: _____

FORM C

IN THE CIRCUIT/COUNTY COURT OF THE _____ JUDICIAL CIRCUIT
IN AND FOR _____ COUNTY, FLORIDA

CASE NO. _____

Plaintiff/Petitioner or in the Interest Of _____
vs.

Defendant/Respondent _____

APPLICATION FOR DETERMINATION OF CIVIL INDIGENT STATUS

Notice to Applicant: If you qualify for civil indigence you must enroll in the clerk's office payment plan and pay a one-time administrative fee of \$25.00. This fee shall not be charged for Dependency or Chapter 39 Termination of Parental Rights actions.

1. I have _____ dependents. (Include only those persons you list on your U.S. Income tax return.)
Are you Married?...Yes....No Does your Spouse Work?...Yes....No Annual Spouse Income? \$ _____

2. I have a net income of \$ _____ paid () weekly () every two weeks () semi-monthly () monthly () yearly () other _____
(Net Income is your total income including salary, wages, bonuses, commissions, allowances, overtime, tips and similar payments, minus deductions required by law and other court-ordered payments such as child support.)

3. I have other income paid () weekly () every two weeks () semi-monthly () monthly () yearly () other _____
(Circle "Yes" and fill in the amount if you have this kind of income, otherwise circle "No")

Second Job.....	Yes \$ _____	No _____	Veterans' benefits.....	Yes \$ _____	No _____
Social Security benefits			Workers compensation.....	Yes \$ _____	No _____
For you.....	Yes \$ _____	No _____	Income from absent family members.....	Yes \$ _____	No _____
For child(ren).....	Yes \$ _____	No _____	Stocks/bonds.....	Yes \$ _____	No _____
Unemployment compensation.....	Yes \$ _____	No _____	Rental Income.....	Yes \$ _____	No _____
Union payments.....	Yes \$ _____	No _____	Dividends or Interest.....	Yes \$ _____	No _____
Retirement/pensions.....	Yes \$ _____	No _____	Other kinds of income not on the list.....	Yes \$ _____	No _____
Trusts.....	Yes \$ _____	No _____	Gifts.....	Yes \$ _____	No _____

I understand that I will be required to make payments for fees and costs to the clerk in accordance with §57.082(5), Florida Statutes, as provided by law, although I may agree to pay more if I choose to do so.

4. I have other assets: (Circle "yes" and fill in the value of the property, otherwise circle "No")

Cash.....	Yes \$ _____	No _____	Savings account.....	Yes \$ _____	No _____
Bank account(s).....	Yes \$ _____	No _____	Stocks/bonds.....	Yes \$ _____	No _____
Certificates of deposit or money market accounts.....	Yes \$ _____	No _____	Homestead Real Property*.....	Yes \$ _____	No _____
Boats*.....	Yes \$ _____	No _____	Motor Vehicle*.....	Yes \$ _____	No _____
			Non-homestead real property/real estate*.....	Yes \$ _____	No _____

*show loans on these assets in paragraph 5

Check one: I () DO () DO NOT expect to receive more assets in the near future. The asset is _____.

5. I have total liabilities and debts of \$ _____ as follows: Motor Vehicle \$ _____, Home \$ _____, Other Real Property \$ _____, Child Support paid direct \$ _____, Credit Cards \$ _____, Medical Bills \$ _____, Cost of medicines (monthly) \$ _____, Other \$ _____.

6. I have a private lawyer in this case..... Yes No

A person who knowingly provides false information to the clerk or the court in seeking a determination of indigent status under s. 57.082, F.S. commits a misdemeanor of the first degree, punishable as provided in s. 775.082, F.S. or s. 775.083, F.S. I attest that the information I have provided on this application is true and accurate to the best of my knowledge.

Signed this _____ day of _____, 20____.

Date of Birth _____ Driver's License or ID Number _____

Signature of Applicant for Indigent Status _____
Print Full Legal Name _____
Phone Number: _____

Address, P O Address, Street, City, State, Zip Code _____

FORM D

IN THE CIRCUIT COURT OF THE SIXTH JUDICIAL CIRCUIT
FOR PINELLAS COUNTY, FLORIDA
Guardianship Division

IN RE: GUARDIAN ADVOCACY OF

CASE NO.: _____

Alleged Person with a Developmental
Disability,
_____ /

WAIVER AND CONSENT TO APPOINTMENT OF GUARDIAN ADVOCATE

(To be completed by family listed below, NOT the Petitioner)

The undersigned, whose complete name is: _____, and who has an interest in the above Guardian Advocacy as the spouse brother sister parent child of the person with a developmental disability/Ward, acknowledges receipt of a copy of the Petition for Appointment of Guardian/Co-Guardian Advocate(s) and hereby waives hearing and notice of hearing thereon, and consents to the settlement and entry of an order granting the relief requested in the Petition without notice or hearing.

Signed this _____ day of _____, 20_____.

Name _____

Address _____

Phone _____

E-mail address _____

IN THE CIRCUIT COURT OF THE SIXTH JUDICIAL
CIRCUIT FOR PINELLAS COUNTY, FLORIDA
Probate Division

IN RE: GUARDIAN ADVOCACY OF

Case No. _____

Alleged Person with a Developmental Disability
_____ /

OATH OF GUARDIAN/ (CO) GUARDIAN ADVOCATE, DESIGNATION OF
RESIDENT AGENT

(Each Guardian Advocate must sign an Oath)

I, _____ (Affiant), state under oath that:

- I will faithfully perform the duties of Guardian/Co-Guardian Advocate of the Person of _____ (The Ward), according to law and that the Petitioner hereby designates _____, who is a resident of the county where this case is filed, and whose address is _____ And whose phone number is _____ as Petitioner's agent For service of process in any action against the Petitioner in the Petitioner's representative capacity, or personally, if that personal action accrued in the performance of the Petitioner's duties.
- My place of residence is _____ and post office address is _____.

Signature _____
 Name _____
 Address _____
 Phone _____
 E-mail address _____

STATE OF FLORIDA
COUNTY OF PINELLAS

Sworn to (or affirmed) and subscribed before me by means of physical presence or online notarization, this _____ day of _____, 20____ by _____ (name of person making statement). by Affiant, who is personally known to me or who produced _____ as identification.

Signature of Notary Public – State of Florida

Name of Notary, Typed, Printed or Stamped

My Commission Expires: _____

IN THE CIRCUIT COURT OF THE SIXTH JUDICIAL
CIRCUIT FOR PINELLAS COUNTY, FLORIDA
Probate Division

IN RE: GUARDIAN ADVOCACY OF

CASE NO. _____

SEC. _____

Alleged Person with a Developmental Disability,

_____ /

NOTICE OF CONFIDENTIAL INFORMATION WITHIN COURT FILING

Pursuant to Florida Rules of Judicial Administration 2.420(d)(2), the filer of a court record at the time of filing shall indicate whether any confidential information is included within the document being filed; identify the confidentiality provision that applies to the identified information; and identify the precise location of the confidential information within the document being filed.

Title/Type of Document(s):

- Petition for Appointment of Guardian/Co-Guardian Advocates of Person, Page(s) _____, Paragraph(s) _____;
- Application of _____ for Appointment as Guardian Advocate, Page(s) _____, Paragraph(s) _____;
- Application of _____ for Appointment as Co-Guardian Advocate, Page(s) _____, Paragraph(s) _____; (if there is co-Guardian)
- Confidential Individual Education Plan and Habilitation/Guardian Reports
- Credit report(s) of _____
(if more than one Guardian, list both names), Entire Report.

Indicate the applicable confidentiality provision(s) below from Rule 2.420(d) (1) (B), by specifying the location within the document on the space provided:

Signature _____

Name _____

Address _____

Phone _____

E-mail address _____

Note: The clerk of court shall review filings identified as containing confidential information to determine whether the information is facially subject to confidentiality under the identified provision. The clerk shall notify the filer in writing within 5 days if the clerk determines that the information is NOT subject to confidentiality, and the records shall not be held as confidential for more than 10 days, unless a motion is filed pursuant to subdivision(d)(3) of Rule 2.420.

FORM G

IN THE CIRCUIT COURT OF THE SIXTH JUDICIAL CIRCUIT
FOR PINELLAS COUNTY, FLORIDA
Probate Division

IN RE: GUARDIAN ADVOCACY OF

CASE NO.: _____

SECTION: _____

A Person with a Developmental Disability,
_____ /

NOTICE OF FILING

PLEASE TAKE NOTICE that the Proposed Guardian/Co-Guardian Advocate,

_____, hereby gives notice of filing the following

documents:

Title/Type of Document(s): (choose which ones apply)

Death certificate of Ward's parent

Confidential Psychological Report/Doctor Report/IEP

Receipt of providing fingerprints for Background Check

Other (describe): _____

Signature _____

Name _____

Address _____

Phone _____

E-mail address _____

(Guardian/Co-Guardian Advocate)

FORM H

**IN THE CIRCUIT COURT OF THE SIXTH JUDICIAL CIRCUIT
FOR PINELLAS COUNTY, FLORIDA
Probate Division**

IN RE: GUARDIAN ADVOCACY OF

CASE NO.: _____

SECTION: _____

A Person with a Developmental Disability,

_____ /

Fingerprint Receipt

FILE AFTER GUARDIANSHIP IS OPENED

Petitioner Name: _____

[ATTACH FINGERPRINT RECEIPT HERE]

FORM I

IN THE CIRCUIT COURT OF THE SIXTH JUDICIAL CIRCUIT
FOR PINELLAS COUNTY, FLORIDA
PROBATE DIVISION

IN RE: GUARDIAN ADVOCACY OF

CASE NO.: _____

A Person with a Developmental Disability,

SECTION: _____

_____/

DESIGNATION OF PRIMARY AND SECONDARY EMAIL ADDRESSES

Please take notice that, pursuant to the Florida Rule of Judicial Administration 2.516, the undersigned, as counsel for the proposed Guardian Advocate, hereby designates the following email addresses for service in this case. All future correspondence and pleadings should be emailed to the following addresses:

Primary Email: _____

Second Email: _____

Signature: _____

Name: _____

Address: _____

Telephone No: _____