



The Basics: Guardianship of an Adult



Step 1: Fill Out Documents

- Probate Information Cover Sheet – complete pg.2 for each Petitioner
- Petition for Permanent Appointment of Guardian
- Affidavit of Person to be Appointed Guardian – for each Petitioner
- Information Sheet to Court Investigator – only provided to Court Investigator with copies of documents
- Physician Report – filed in confidential 9” x 12” envelope
- Notice of Hearing – Probate Court Administration sets hearing date
- Application for Deferral or Waiver of Court Fees and Costs – based on the finances of the Estate

Step 2: File Documents with Clerk of Court

Signed Original and three copies of documents (Commissioner, Court Investigator & you) *except* only need 2 copies- Probate Information Cover Sheet and *only* one copy- Information Sheet to Court Investigator

Step 3: No Deferral- Pay Fees (see above) Filing Fees \$651 (\$251 filing fee and \$400 Court Investigator)

Step 4: Once Documents Are Filed

Call Office of Public Defense Services at 602-506-7228 to get Court-appointed counsel.

Must have available the name, address and phone number of proposed Ward, case number, date and time of hearing and name of Commissioner.

Step 5: After Obtaining Court Appointed Counsel

Complete Order Appointing Attorney, Physician and Court Investigator for Guardian for an Adult. Name of the physician must be the name of the physician provided in the Petition. *TIP: File original and three copies*

Step 6: Provide Notice

A. Serve the following documents:

- Petition for Guardianship
- Affidavit(s) of Appointees (if there are Co-Petitioners)
- Physician’s Report (optional)
- Notice of Hearing

B. Mail copies of above to: Court Appointed Counsel, parents, spouse, adult children, or closest relative.

C. File Affidavit/Certificate of Service (process servers will file with the Court)



D. File Proof of Mailing with the Court



Step 7: Complete Training

Watch video or view pdf of materials at www.azcourts.gov/probate/Training

MUST VIEW BOTH-

Introduction to Serving as a Non-Licensed Fiduciary **AND** Welcome to Guardianship

THEN Print out Certificates at the end of each module

AND File them with the Court

***must be filed before the Letters of Appointment will be issued

Step 8: Provide The Orders to Court

At least 10 days before the hearing, provide the Commissioner with an original and one copy of Order to Guardian and Order of Appointment of Guardian.
Bring an extra copy for each certified order you want issued.

Step 9: Obtain Letters of Appointment

Must be issued within 10 days from the date of the Order of Guardianship.

Step 10: The Final Hurdle

Within 30 days after the Letters are issued, mail copy of Order to Guardian to the person's who received notice.

NEED HELP?? Contact Volunteer Lawyers Program (602-258-3434) **not everyone receives assistance

Continuing Obligations to the Court

Change of Address-- Use the Probate Information form

For the Ward within 3 days. For the Guardian within 10 days; Notice of death of the Ward within 10 days.

Annual Report of Guardian--Form is on Superior Court Website

Must be filed by the anniversary date of when the Letters of Appointment issued.

The Annual Report *must include* a Physician Report **AND IF** Representative Payee, the Accounting provided to Social Security.

Physician Report should be filed as a confidential document but not the Annual Report.



Mail a copy of the Annual Report with the Physician Report to persons who received Notice.