

Informing Families

Building Trust

A Partnership for Better Communication
on Developmental Disability Issues in Washington State

Duties of Guardianship: Keeping Good Records

This fact sheet is intended for educational purposes only. If you have specific questions or concerns, please consult an attorney.

It takes a lot of organization to make sure you've got all the information you need to fill out the required forms for lay (non-professional) guardianship. Accurate accounting of money spent is essential, and the better your record-keeping, the less likely you may need to hire an attorney to file for renewals. The following tips come from parents who offer some good ideas for saving a little time and frustration when those guardianship reports are due.

Tips for Guardianship Record Keeping

- **Consider purchasing a simple record and accounting software program, such as Excel or Quicken.** At the very least, record all expenses paid and reimbursements made in a record-keeping book. Keep all your receipts.
- **Organize proposed budget and expenditures by category,** such as: medical, food, transportation, entertainment, rent, utilities, and purchases that don't fit into other categories (e.g., furniture or a car or credit card payments). Check to see what your county requires.
- **Make a copy of everything submitted to the court.** When it is time to renew the guardianship, you'll have a template of what forms you need to download and what additional information you need to submit.
- **Report significant changes in income or expenses to the court when they occur.** You'll need the court's approval to update or revise a budget.
- **Prepare your court reports.** Initial and annual reports must be filed within 90 days after your anniversary date—the date you were appointed guardian.
- **Check with your county court for the due date of your report.**

Required Guardianship Forms at a Glance*

*Check your county court website for specific requirements in your area.

Within First 90 days of Guardianship

Initial Personal Care Plan (Guardianship of the Person): The individual's needs, available resources, and what your plan will be to meet the identified needs.

Guardianship Inventory (Guardianship of the Estate): Assets such as real estate, personal property, bank account balance, monthly income, liabilities/debts.

Designation of a Standby Guardian. (All).

Periodic

(annually, or up to every 3 years, as directed by the court)

Guardian's Report Accounting and Proposed Budget (All).

Periodic Personal Care Plan (Guardianship of the Person).

Additional Resources

WashingtonLawHelp: washingtonlawhelp.org

Disability Rights Washington: disabilityrightswa.org



My attorney hands me a giant packet of paperwork that I have to fill out. I was just totally overwhelmed. I had no idea where to even start on it.

We had a shoe box full of receipts with check numbers on every single receipt for everything we've ever spent. That's not good enough.

You need to have it listed where you can just go in and quickly access it, otherwise it's going to take hours and hours.

—Diane Evans, Parent

