PACKET FOR TEMPORARY ADULT GUARDIANSHIP

- 1. You must pay the filing fee of \$177.00. If you want the Court to consider a partial or full waiver of the filing fee, you must request a fee waiver by completing a separate petition and making a direct request to the Court staff and/or Judge. There are fee waivers located in the Clerk's office.
- 2. These documents are for the filing of an Temporary ADULT guardianship, and are available to you if you do not have an attorney. IMPORTANT: THE CLERK, COURTS AND/OR COURT STAFF DO NOT PROVIDE LEGAL ADVICE. IF YOU NEED ADVICE, YOU MUST CONSULT WITH AN ATTORNEY.
- 3. The Petition for Temporary Guardianship and the Physician's Report **MUST** be completed.
- 4. You **MUST** read and sign the Instructions to Guardians and complete the Guardianship Registry Information Sheet. These documents will be entered on to the Court's records.
- 5. The Summons, Appearance and Petition **MUST** be served on each living parent or child of the incapacitated adult, the incapacitated adult (him/herself) and on any other person required to be served by the Court. SERVICE MUST BE MADE IN ACCORDANCE WITH COURT RULES. A HEARING DATE AND TIME WILL BE SCHEDULED BY THE COURT. **YOU MUST ATTEND.**

CHECKLIST

	YES
1. Filing fee paid? Case opened?	
2. Petition for Temporary Guardianship completed?	
3. Physician's Report completed?	
4. Instructions to Guardian reviewed/signed?	
5. Guardianship Registry completed?	
6. Appearance completed?	
7. Summons completed?	
8. Notice of Hearing completed for each necessary person (including the incapacitate person)?	
9. Papers mailed/served on each person as required by Court?	
10.Hearing date scheduled by Court?	
11.Service perfected on all parties?	
12.My case number is	
13. My hearing date is set for	

FAILURE TO COMPLETE ALL DOCUMENTS AND PROVIDE PROPER SERVICE WILL DELAY THE PROCESS

IN THE CLARK COUNTY COURTS

IN RE	RE THE GUARDIANSHIP OF:			
ADU	ULT/PROTECTED PERSON			
	CASI	E NO.		
	APPEARANCE BY UNREPRESE TEMPORARY GUARDIANSHI			
	1EWI ORAKI GUARDIANSIII	T TROCEEDINGS		
1.	1. My name is	and I am		
	Initiating (Petitioner)			
	Responding (Interested Party)			
	In this case I am not represented by a lawye	r.		
Contact information for receiving documents and case informat		ts and case information is required by		
	Court Rules:	Court Rules:		
	Address:			
	Email Address:			
	Phone number:			
3.	3. This is a GU case – Guardianship - Adult			
4	4. There are related cases:			
1.	YES			
	NO			
Capti	otion and case numbers of related case:			
Capti	otion:Cas	e No		
Date:	e:			
	Pei	itioner		

CERTIFICATE OF SERVICE

I hereby certify I am serving this docu	ament by:	
Certified mail		
Service by Sheriff (County)	
Publication		
Acknowledgment		
Process Server		
	Signature	

Guardianship Information Sheet

Choose One* (☐ Individual ☐ Estate ☐ Estate and Individual)

Choose One* (☐ Minor ☐ Adult)

Choose One*(☐ Temporary ☐ Permanent)

Related Cases (List any cases in which the Protected Person is a party, e.g., CHINS)

Relationship to Protected Person* Petitioner Last:*_____ Suffix:____ First:*_____ Middle:_____ DOB: Gender:* Race:* Hispanic?: Yes/No Address:*_____ Email Address:* ______ Bar Number:_____ App. Filed Date: _____ Attorney Name: Estimated Value \$____ **Protected Person** Last:*_____ Suffix:____ First:*_____ Middle:_____ DOB:*_____ Gender:*____ Race:*____ Hispanic?: Yes/No Eye Color:_____ Hair Color:_____ Height:____ Weight:____ lbs Scars, Marks, and Tattoos: Address:*_____ Home Phone: Cell Phone: Email Address:*_____ Attorney Name: _____ Bar Number: ____ App. Filed Date: _____ Guardian Ad Litem Full Name: Interpreter required? Yes/No Language: _____ Guardian ☐ Check if same as petitioner ☐ Certified (Only check if Federal or State Certified) Last:*_____ Suffix:____ First:*_____ Middle:_____ _____ Gender:*____ Race:*_____ Hispanic?: Yes/No DOB: Address:*___ Home Phone: _____ Work Phone:_____ Cell Phone:_____ Email Address:* _____ Bar Number:_____ App. Filed Date: ___ Attorney Name: **Guardian Institution** Name:*_____ Address:* _____ Agent Name:____ Phone:_____ Fax:___ Close Relative (Entitled to Notice) Relationship to Protected Person _____ Last:*_____ Suffix:____ First:*_____ Middle:_____ Gender:* Race:* Hispanic?: Yes/No Mailing Address:*_____ Home Phone: Cell Phone: Email Address:*_

Guardianship Information Sheet

(Additional)

Petitioner	Relationship to Protected Person	
Last:*	Suffix: First:*	Middle:
		Hispanic?: Yes/No
Address:*		
Home Phone:	Work Phone:	Cell Phone:
Email Address:		
Attorney Name:	Bar Number:	App. Filed Date:
Guardian Check if s	same as petitioner Certifi	ed (Only check if Federal or State Certified)
Last:*	Suffix: First:*	Middle:
DOB:	Gender:* Race:*	Hispanic?: Yes/No
Address:*		
Home Phone:	Work Phone:	Cell Phone:
Email Address:		
Attorney Name:	Bar Number:	App. Filed Date:
Close Relative (Entitled	to Notice) Relationship to Prot	tected Person
Last:*	Suffix: First:*	Middle:
	* Hispanic?: Yes/No	
Mailing Address:*		
Home Phone:	Work Phone:	Cell Phone:
Email Address:		
Interested Party		
Last:*	Suffix: First:*	Middle:
	.* Hispanic?: Yes/No	
Address:*		
Home Phone:	Work Phone:	Cell Phone:
Email Address:		
Interested Party		
Last:*	Suffix: First:*	Middle:
Gender:* Race:	* Hispanic?: Yes/No	
Address:*		
Home Phone:	Work Phone:	Cell Phone:
Email Address:		

IN THE CLARK COUNTY COURTS

IIN KE	THE GUARDIANSHIP OF:	
ADUI	LT/PROTECTED PERSON	CASE NO
		TMENT OF TEMPORARY VER AN ADULT
	Petitioner, after being duly sworn, p	etitions the Court as follows:
1.		Name of Adult/Protected Person), who is residing in Clark County, Indiana is an
2.	The Petitioner's relationship to the in (spouse, c	
3.	drunkenness, excessive use of drugs	iency, physical illness, infirmity, habitual, incarceration, confinement, detention, ners on the individual or other incapacity
4.	A Physician's Report is attached to the Yes Yes No (a Physician's Report is Report	EQUIRED if the incapacity is related to
5.	A guardian has been appointed for t jurisdiction or State? No Yes (If YES, provide details)	

6. The address of the <i>incapacitated p</i>	verson is:
7. The Petitioner's address is:	
8. The person(s) most closely related person is/are:	by blood or marriage to the incapacitate
Person 1:	Person 2:
Address:	Address:
Phone No	Phone No
Person 3:	Person 4:
Address:	Address:
the incapacitate person is:	on or institution having the care and custody of
10. No person appears to have the auperson.	thority to act on behalf of the incapacitated

- 11. The Petitioner requests that the Court grant him/her/them all of the responsibilities and powers accorded a guardian over the estate and person of an incapacitated person by Indiana law, as detailed in I.C. 29-3-8.
- 12. The Petitioner requests a hearing on the temporary guardianship as soon as adequate notice can be given pursuant to I.C. 29-3-6-1 and 29-3-6-2 to the protected person, all parties entitled to notice, and to all parties and persons directed by the Court to receive notice.

13. Petitioner acknowledges that he/she is responsible for service, in accordance with the Indiana Trial Rules, on the incapacitated person and all other persons entitled to notice, and to any and all other persons directed by the Court to receive notice. The Petitioner further acknowledges that he/she understands that no hearing will commence unless and until proper service is completed.

WHEREFORE, the Petitioner respectfully requests the Court to enter an order:

- 1. Setting a hearing on this petition as soon as possible consistent with the preservation of the rights of the alleged incapacitated person;
- 2. Requiring that all necessary parties and persons be given adequate notice of the guardianship proceedings;
- 3. Adjudicate incapacity;
- 4. Finding that a temporary guardian of the person and estate needs to be appointed;
- 5. Finding that the Petitioner is a suitable person to be appointed tenporary guardian of the person and estate of the incapacitated person upon taking an oath and acceptance of the appointment;
- 6. Establish a bond, if necessary and set out the duties and powers of the temporary guardian; and
- 7. Granting all other relief which is proper in the premises.

I AFFIRM UNDER THE PENALTIES FOR PERJURY THAT THE FOREGOING REPRESENTATIONS ARE TRUE TO THE BEST OF MY KNOWLEDGE.

DATE:	
	Signature of Petitioner

IN THE CLARK COUNTY COURTS

A DAM WAD ONE CASE DED COM	CASE NO
ADULT/PROTECTED PERSON	
	PHYSICIAN'S REPORT
Dr	, a physician licensed to practice medicine in the State of
ndiana, submits the following report on_	, an alleged incapacitated person, based on
an examination of	on
1. Describe the nature and ty	ype of the respondent's cognitive/mental disability:
2. Describe the respondent	's mental and physical condition; and, when it is appropriate, describe
educational condition, adaptive be	ehavior and social skills:
-	
3. State whether, in your o	ppinion, the respondent is totally or only partially incapable of making
personal and financial decisions;	and, if the latter, the kinds of decisions which the respondent can and
cannot make. Include the reason	•
4. What, in your opinion, i	is the most appropriate living arrangement for the respondent; and, if
applicable, describe the most ap	propriate treatment or habilitation plan. Include the reasons for your
opinion.	

5.	Can the respondent appear in court w	vithout injury to his/her health?	
	Yes	No	
	If the answer is no, explain the	he medical reasons for your answer.	
I affiri	n, under penalties of perjury, that the	foregoing representations are true:	
	ian's Signature ian Name		
Addres	58		
Phone			
PERSO SKILL PREPA	ON'S MENTAL, PHYSICAL OR EDU S IS BASED ON EVALUATION ARING EVALUATIONS MUST SI ORMED WITHIN THREE (3) MONT	PHYSICIAN. IF THE DESCRIPTION OF THE JCATIONAL CONDITION, ADAPTIVE BEHANS BY OTHER PROFESSIONALS, ALL IGN THE REPORT. EVALUATIONS MUTHS OF THE DATE OF THE FILING OF THE	VIOR OR SOCIAL PROFESSIONALS JST HAVE BEEN
Names	and addresses of other persons who po	erformed evaluations upon which this report is ba	ased:
Signati	ure	Signature	-
Printed	l Name	Printed Name	-
Addres	SS	Address	-
Positio	on/Employer	Position/Employer	-

IN THE COUNTY COURTS

IN RE THE GUARDIANSHIP OF:		CASE NO
ADULT/PROTECTED PERSON		
	<u>SUMMONS</u>	
 You are hereby notified that interest in. 	an action has been	filed in Court that you may have
2. The nature of the action is st Summons.	ated in the Petition	which is attached to this
It is suggested that you consmatter.	sult with an attorne	y of your choice regarding this
	23) days if this Sum	led with the Court within twenty mons was received by mail), or ner.
The following manner of service is	designated:	
		certified mail
		Acknowledgment
		Publication
		Sheriff () County
Date:		
	CLERK, Clarl	k County Circuit Courts

IN THE CLARK COUNTY COURTS

IN RE THE MATTER OF THE GUARDI	ANSHIP OF:	
ADULT/PROTECTED PERSON	CA	ASE NO:
NOTICE	E OF HEARIN	<u>IG</u>
ΓΟ: PETITIONER / RESPONDENT AN	D ALL INTERE	ESTED PARTIES
On be held to determine whether a tempora incapacitated adult. A copy of the petitic guardian is attached to this notice.	ry guardian sho	ould be appointed for the above
At the hearing, the Court will det incapacitated adult under Indiana law. rights of the individual. If the Court find the Court shall also consider whether the temporary guardian of the individual. To other qualified person as temporary guardian of the temporary guardian of the temporary control over certain property and activit protective order should be entered on be	This proceeding ds that the indiverse Petitioner shout the Court may, in the Court may, in the Court suardian to allow ties. The Court suardies.	may substantially affect the ridual is an incapacitated adult, ald be appointed as the n its discretion, appoint some rt may also, it its discretion, limit ow the individual to retain may also determine whether a
The Court may, where required, a alleged incapacitated adult at the hearin		an Ad Litem to represent the
The Court may on its own motior the hearing to another date and time.	n or on request o	of any interested person, postpone
DATE:	 JUDGE/MAG	

IN RE THE GUARDIANSHIP OF:	CASE NO
ADULT	
	POINTMENT OF A TEMPORARY GUARDIAN
<u> </u>	BUANDIAN
Comes now	, being sworn upon his/her oath,
says that he/she is an adult and the	of
and is familiar with the Petition Filed by the l	
guardian over the person of	and CONSENTS to
	, and hereby
	otice of Hearing on said Guardianship Petition.
onpressi, war es service et summens una to	one of fremming on said Guardianismp Temizoni
D-4-1	
Dated:	Signature
	Relationship to Protected Person
Subscribed and sworn to before me, a Notary	Public in and for the State of,
County of, this _	day of
My Commission Expires:	
	Notary Public

Printed Name

INSTRUCTIONS TO GUARDIANS

Read carefully, date and sign one copy and return it to the Court within 10-days. Keep a copy for your reference.

You have been appointed temporary guardian of an individual who, because of age or some incapacity, is unable to care for his or her own financial and/or personal affairs. It is important that you understand the significance of this appointment and your responsibility as temporary guardian.

Upon being appointed temporary guardian, you may be required to post a bond in an amount set by the court and to take an oath to faithfully discharge your duties as temporary guardian. The bond assures the court that you will properly protect the assets of the protected person.

Listed below are SOME of your duties. These apply whether or not the protected person is your relative. Ask the attorney for the temporary guardianship to fully explain to you each of the items below and to inform you about other duties you have in your particular circumstances. Although the attorney will file all the papers with the court, the ultimate responsibility to see that all reports and papers are accurately prepared and filed rests with you.

As temporary guardian, you are required to:

- 1. File with the court, within Ninety (90) days after your appointment, a verified inventory of all property belonging to the protected person.
- 2. File with the court, within Thirty (30) days of the first anniversary of your appointment and, thereafter, every two (2) years, a verified account. This details all property and income received by and all expenses paid from the guardianship.
 - a. Vouchers or receipts should be attached in order to verify each expenditure;
 - b. The present residence and general welfare of the protected person must be stated;
 - c. A report from the treating physician is required if the incapacitated person is an adult;
 - d. Pay bond premiums and court costs as they become due (if required by the Court);
 - e. File federal and state tax returns and to pay taxes for the protected person;
 - f. To open an account, in your name as temporary guardian, in which all of the cash assets of the protected person are deposited. This account shall be used for all payments and disbursements on behalf of the guardianship and the protected person. Cancelled checks and other written proof should be maintained;

- g. To obtain approval from the court to use guardianship assets.
- h. To file a final accounting upon termination of the guardianship. This should detail all property and income received and all expenses paid, with receipts to verify each expenditure.

A temporary guardian is obliged to encourage self-reliability and independence of the protected person and to consider recommendations relating to the appropriate standard of support.

You must protect and preserve the protected person's property and conserve any property of the protected person in excess of the protected person's needs. Accurate accounts must be kept and guardianship funds should never be combined with your personal funds.

You may not make expenditure of investments from guardianship funds without court approval. Unauthorized use of guardianship assets may result in personal liability and/or criminal prosecution.
If any questions arise during the guardianship, you should consult with your attorney.

NICHOLAS A KARAFFA, JUDGE	
CLARK CIRCUIT COURT NO. 1	

I acknowledge receipt of	a copy of the	above instructions	and have read	and will follow
said instructions carefully.				

Case No.	Guardianship of:
Date:	
	Signature of Temporary Guardian
	Printed Name of Temporary Guardian

IN RE THE GUARDIANSHIP OF:	CASE NO		
ADULT	-		
	O OATH OF TEMPORARY		
	NTED OVER PERSON OF TATED PERSON		
INCAFACI	HATED FERSON		
Comes	(Name of Temporary Guardian)		
and hereby accepts the Court's appointment	as Temporary Guardian over the person and		
estate of	(Name of Incapacitated Person) and affirms		
under the penalties of perjury, to faithfully of	discharge his/her duties as temporary guardian		
as enumerated by the Court's order.			
Date:			
			
 _ Signature of Temporary Guardian	Signature of Temporary Guardian		
Printed Name of Temporary Guardian	Printed Name of Temporary Guardian		

IN THE MATTER OF THE	
GUARDIANSHIP OF:	
	CASE NO.
ADULT ,	
TEMPORARY GUARDIA	AN'S INVENTORY
Pursuant to I.C. 29-3-9-5 which require	es guardians to file with the Court a
written verified account of the guardia	an's administration, the
Temporary Guardian,	, in person, hereby files with the
Court the following inventory of assets, which	have come to the possession or
knowledge of said temporary guardian in this	case:
ASSETS:	
Clothing & Personal items	\$
Savings/Checking Account	\$
Identify:	
TOTAL ASSETS:	\$
TOTAL LIABILITES: (list expendi	
·································	,
NET ASSETS:	\$
This inventory and the written verified a	ccounts may be inspected at the
Court's address. The Temporary Guardian shall	l keep suitable records of the guardian's
administration and exhibit the records as ordere	
	·
I AFFIRM UNDER THE PENALT	-
FOREGOING REPRESENTATIONS ARE TRU	JE.
Date:	
	Signature of Temporary Guardian
	15 intait of Temporary Guardian

IN THE MATTER		CASE NO
GUARDIANSHIP	OF:	CASE NO
	TEMPORARY GUARDIA	N'S ACCOUNTING
Comes now	,,	Temporary Guardian of the estate of
accounting, which	, (an incapacitated accounting is as follows:	d adult), and files his/her interim
This accou	nting covers the periods from	to and
		to und
accounting), the Thaving a value of \$ That during following monies	emporary Guardian was accountaged the period of this accounting, the and assets on behalf of the ward's	opraisement an inventory – last interim able for assets of his/her ward's estate the Temporary Guardian received the se estate: where the able for assets of his/her ward's estate the temporary Guardian received the se estate:
	eccounting.) Use additional pages	
<u>DATE</u>	INCOME OR ASSET	AMOUNT OR VALUE

That during the period of this accounting, the Temporary Guardian has expended the following sums of for the care, support and education of his/her ward:

(Here itemize each expenditure made by you, by date, during the accounting period. Cancelled checks, or copies of cancelled checks should be filed with the accounting. If the original checks are filed, they will be returned by mail after the Judge has examined and approved the accounting.)

<u>DATE</u> <u>RECIPENT</u>	<u>AN</u>	<u>IOUNT</u>
That by way of recapitulation, the Tempor	ary Guardian shows	the Court the following:
Value of ward's estate at the beginning	ng of accounting:	\$
Income or other assets received during	ng accounting:	\$
Expenditures during accounting peri	od:	\$
Net gain or loss of estate during acco	ounting period:	\$
Value of ward's estate at close of acc	counting:	\$
he Temporary Guardian now asks that the	Court examine and	approve this interim
accounting. Filed this day of		,
·		
·	Guardian's Name_	

Page 2 of 2

RDIANSHIP OF: CASE NO
PR/ADULT
TEMPORARY GUARDIAN'S STATUS REPORT TO THE COURT
ndersigned is the duly appointed and serving temporary guardian over the person of the
-named Protected Person and states that:
The Protected Person is a child/adult and is currently years of age.
The Protected Person currently resides at
Please provide a brief description of their living situation and activities:
Describe how often you physically see the Protected Person:
Does the Guardianship over the person of the Protected Person need to remain in effect? Yes No - If not, provide a brief description of why not.
If you are also the Guardian over the Estate of the Protected Person, please describe the Protected Person's assets and attach a copy of your accounting. Please do not include any full social security numbers in any attached document.

I AFFIRM UNDER PENALTIES FOR P	ERJURY THAT THE FOREGOING	
REPRESENTATIONS ARE TRUE AND ACCURATE.		
Dated:		
	TEMPORARY GUARDIAN	
	(Signature)	
	TEMPORARY GUARDIAN	
	(Printed Name)	
Temporary Guardian Phone Number:		
	Temporary Guardian Mailing	
	Address:	

IN THE MATTER OF THE GUARDIANSHIP OF:	CASE NO		
An Incapacitated Person Adult/Minor			
<u>LET</u>	TERS OF GUARDIA	<u>NSHIP</u>	
I, Ryan Lynch, Clerk of the Courts o	•	• • •	
Was appointed Temporary Legal Tem			
	, (DOB:) that Letters of	
Guardianship of	, are GR	ANTED to said Guardian, and the	
Guardian having qualified, is duly as	uthorized to take upon	(himself/herself) the administration of	
such Guardianship, according to law	7.		
WITNESS my hand and seal	-		
		Ryan Lynch, Clerk	
		Clark County Courts	

	RDIANSHIP OF:		CASE NO.	
MINO	DR/ADULT			
ORD	DER APPOINTING TEMPOR			P OVER PERSON
		ESTATE OF		
 Petitior	[Nam [Namon for the Appointment of a Temporary G	=		[his/her] Verified d Estate of
Court a	[Name of Inc and part of the Court's record. The Court red in person; and the Court, having heard	capacitated Person, having reviewed levidence thereof	on] which Petited the Petition; on on	ion is on file with the and the Petitioner, having [date of
_	g], and being fully advised in the premise e, and that:	s, now finds tha	t the allegation	s contained in said Petition
2.	served notice of these guardianship proceed filed herein or by (his/her) the Court hearing (and testific incapacitated person)'s medical conditions.	ceedings and has by written waiver] [(name of incaged) or	s received a co	py of the Petition for [the certificate of serviced on) appeared in person at (name of
•	it detrimental to (his/her) heatestify during the hearing].	alth to require	(him/her) to appear in Court and
	Notice required under the statute and by persons as evidenced by the certified m	nail receipts filed	l herein.	•
4.	[age] years of age, a resident			
	[address], is incapable of handling [his/			use of and is hereby
5.	found to be an incapacitated person und temporary guardian because of	[name of inca [his/her] in	ncapacity, and i	on] is in need of a t is in the best interests of
		[name of ir	ncapacitated pe	rson] that a temporary

guardian be appointed over [his/her] person and estate.

6.	[name of petitioner] is a suitable person to serve as				
	temporary guardian and is fully qualified and willing to assume the duties and responsibilities of the guardianship.				
7	All of the requirements for the appointment of a temporary guardian as set for in the Indiana				
,.	Code have been satisfied, and [name of petitioner] is				
	entitled to be a temporary guardian of the person and estate of				
	[name of incapacitated person] and is so appointed				
	without any limitations as to [his/her] duties, responsibilities, or powers as set out in				
	IC 29-3-8-1, 29-3-8-2 and 29-3-8-4.				
8.					
	The estimated value of [name of incapacitated person]'s property is Dollars (\$). That one (1)				
	year's estimated income from the property is Dollars (\$).				
	That the total amount of the bond to be posted by the temporary guardian according to IC				
	29-3-7-1(a) is [amount of bond] Dollars				
	(\$).				
IS T	THEREFORE ORDERED, ADJUDGED AND DECREED by the Court that:				
1.	[name of incapacitated person] by reason of				
	[his/her] incapacity is unable to care for [his/her] person and estate and is, therefore,				
	adjudicated to be an incapacitated person and the appointment of a temporary guardian over				
	[his/her] person and estate is necessary.				
2.	[name of petitioner] is the most qualified and				
	suitable person available to serve as temporary guardian and is hereby appointed as the guardian				
	of the person and estate of [name of incapacitated				
	person].				
3.	[name of petitioner] shall serve as temporary				
	guardian upon taking an oath before the Clerk of this Court				
	[and upon posting a bond in the amount of (amount of bond) Dollars				
	(\$)].				
4.	Upon taking such an oath, [and upon posting such a bond] and agreeing				
	to the terms of this Order of the Clerk of this Court is directed to issue Letters of Guardianship				
	of the Person and Estate to [name of petitioner], without any limitations as the temporary guardian is authorized to exercise all powers granted a guardian				
	of the person and estate of an incapacitated person as set forth in IC 29-3-8-1, 29-3-8-2 and				
	29-3-8-4.				
11 of s	which is ordered [date].				
11 01	which is ordered [unite].				
	Judge, Clark County Courts				