



How to Enter a Paper-Filed Guardian of the Estate Report

1. Search for the case

On your Dashboard, click in the **Case File No** field, enter the number for the appropriate case, and press *[Enter]* on your keyboard.

Find a Case

* Case File No:

[Advanced Search](#)

- [Incapacitated Person](#)
- [Case Actions](#)
- [Guardians](#)
- [Other Case Participants](#)
- [Attorneys](#)
- [Reports](#)**
- [Bond Ordered](#)
- [Suppressed Flags](#)

2. In the GTS Case screen, click the **Reports** tab

3. Open the report

Click the Create Report icon next to the Estate report.

Report	Due Date	Status	Flags
Estate	12/01/2022	Eligible for Submission	<input type="button" value="+"/>
Inventory	03/01/2022	Accepted	<input type="button" value="+"/>
Person	12/01/2022	Eligible for Submission	<input type="button" value="+"/>

Tip If there are multiple guardians associated to the Estate domain, you will click the Guardian Selection icon  instead.

4. Specify the submitter

If the case has more than one guardian, the Guardian Selection popup appears. Click the Create Report icon next to the name of the guardian that submitted the report. Continue to Step 5.

Guardian Selection

Guardian	
Boggs, Cameron	<input type="button" value="+"/>
Zimmerman, Joseph K	<input type="button" value="+"/>

If the popup does not appear, continue to Step 5.

5. Part I, #1 & #2

On the Report of the Guardian of the Estate screen, confirm that the information appearing under each of these questions is accurate.

Tip If this information is incorrect, the existing adjudicatory case action must be removed and replaced with a new one that contains the updated information.

PART I. INTRODUCTION

1. Guardian Name(s)
Guardian Name(s): Joseph Zimmerman

2. Is this a limited Guardianship?
* Limited Guardianship:

3. Report Period
* Report Type:

* Report Period Start Date:

* Report Period End Date:

6. Part I, #3: Report Type

Click on the **Report Type** dropdown and select the appropriate option.

How to Enter a Paper-Filed Guardian of the Estate Report



7. Part II, Did the IP receive income?

If the IP received income during the reporting period and you want to itemize the individual sources, proceed to Step 9.

Otherwise, select 'No' from the dropdown and continue to Step 8.

PART II: INCOME

1. List all sources of income received during the Report Period

Did the Incapacitated Person receive any of the following?

* Do you wish to enter income details for the incapacitated person: No

* Please enter the total income amount: 9810

8. Part II, #1 (cont.): Total income amount

Click in the field and enter the IP's total income for the reporting year. Proceed to Step 13.

9. Part II, #1 (cont.): Click the Add Income Source icon

PART II: INCOME

1. List all sources of income received during the Report Period

Did the Incapacitated Person receive any of the following?

* Do you wish to enter income details for the incapacitated person: Yes

Income Source Type	Income Description	Income Amount	
Social Security Benefits (Retire)		9810	
		SubTotal:	
			9810

10. Part II, #1: Income source type

Click on the **Income Source Type** dropdown and select the option that best describes the income that the IP receives.

Tip If you choose 'Other', you must enter a description of the income.

11. Part II, #1 (cont.): Income amount

Click in the **Income Amount** field and enter the annual income, in U.S. dollars, for the selected income source type.

12. Part II, #1 (cont.): Add other income

Repeat Steps 9-11 for any additional sources of income for the IP.

How to Enter a Paper-Filed Guardian of the Estate Report



13. Part III: Did the IP have expenses?

If the IP had expenses during the reporting period that were paid from their income or estate, and you want to itemize these costs, click on the dropdown and select 'Yes'. Proceed to Step 15.

Otherwise, select 'No' from the dropdown and continue to Step 14.

14. Part III, #1 (cont.): Total expense amount

Click in the field and enter the IP's total expenses for the reporting year. Proceed to Step 20.

15. Part III, #1 (cont.): Click the Add Expense icon

Expense	Payee	Expense Description	Expense Amount
Personal Expenses (including)	Weekly Spending		5200
Medical Insurance Premiums	Delta Dental		400
Medical Expenses	Dr. Miranda Lovell		1400
SubTotal:			7000

16. Part III, #1 (cont.): Expense Source Type

Click on the **Expense** dropdown and select the option that best describes the expense that you are attempting to enter.

17. Part III, #1 (cont.): Payee

Click in the **Payee** field and enter the person or organization to whom the money was paid.

18. Part III, #1 (cont.): Expense amount

Click in the **Expense Amount** field and enter the total amount, in U.S. dollars, of the expense.

19. Part III, #1 (cont.): Add other expenses

Repeat Steps 15-18 for any additional expenses paid for from the IP's income or estate.

How to Enter a Paper-Filed Guardian of the Estate Report



20. Part III, #2: *Credit cards*

Click on the dropdown and select 'Yes' or 'No' to specify if the IP has credit cards in their name.

If you selected 'Yes', continue to Step 21.

If you selected 'No', 'Not Answered', or 'Needs Review', proceed to Step 23.

2. Does the Incapacitated Person have a credit card(s)?

* Does IP have Credit Card(s): Yes

* If yes, has it been used during this report period?: Yes

* What is the balance on the credit card(s)? 456

21. Part III, #2 (cont.): *Credit card use*

Click on the dropdown and select 'Yes' or 'No' to specify if the credit card(s) was used during the specified reporting period.

22. Part III, #2 (cont.): *Credit card balance*

Click in the field and enter the current balance on the credit card(s).

2. Unspent Income from Previous Year (Part IV, Question 5 from Last Year's Report)

* Unspent Previous Year Income: 250

23. Part IV, #2: *Unspent income*

Verify or enter the IP's unspent income, in U.S. dollars, for the previous reporting year.

Tip This amount equals the total income minus the total expenses and, if applicable, can be found in Part IV, Question #5 of the previous year's Guardian of the Estate report.

Tip If this is the first Guardian of the Estate report being filed for this IP, leave this field blank. If previous Estate reports for this IP have been filed on paper, and this is the first time it is being recorded in GTS, enter the unspent income from the last paper report.

How to Enter a Paper-Filed Guardian of the Estate Report



24. Part IV, #6:

Principal Spent

If the Unspent Income (Question #5) is greater than \$0, then the first dropdown in Question #6 will default to 'No'. If this occurred, proceed to Step 27.

6. Is PRINCIPAL SPENT greater than \$0

Principal Spent: No

If the Principal Spent (Question #5) is greater than \$0, then the first field in Question #6 will default to 'Yes'. Click on the second dropdown and select 'Yes' or 'No' to specify if a court order was obtained to spend part of the principal. If 'Yes', continue to Step 25. If 'No', proceed to Step 26.

6. Is PRINCIPAL SPENT greater than \$0

Principal Spent: Yes

* Invasion of Principal Order: Yes

Invasion of Principal Order Date: 06/07/2022

25. (Optional) Part IV, #6 (cont.): Court order date

Click in the **Invasion of Principal Order Date** field and enter the date of the order that authorized the use of the IP's principal to pay expenses. Proceed to Step 27.

26. Part IV, #6 (cont.):

Explanation

Based on the details provided by the guardian, click in the field and enter a summary that explains why court approval was not obtained to use the IP's principal to pay expenses.

6. Is PRINCIPAL SPENT greater than \$0

Principal Spent: Yes

* Invasion of Principal Order: No

* Invasion of Principal Explanation: The decree of adjudication of incapacity provided the guardians limited permission to spend principal if a situation should arise that requires

27. Part V, #1: Inventory Assets

If the total value of the IP's assets is available electronically from the Inventory report, this field defaults automatically. If this amount displays, continue to Step 28.

PART V. ASSETS

1. What was the value of the assets reported on the Inventory?

* Inventory Asset: 1801

Note: This is a computed field.

If total value of the IP's assets is not available electronically, click in the field and enter this amount. This can be found on the paper version of the Inventory report. Continue to Step 28.

How to Enter a Paper-Filed Guardian of the Estate Report



28. Part V, #2: Does the IP have assets?

If the IP has assets, regardless of whether they were obtained during the reporting period, and you want to itemize this information, click on the dropdown and select 'Yes'. Continue to Step 29.

If you do not want to itemize the IP's assets or the IP has no assets, click on the dropdown and select 'No'. Proceed to Step 34.

2. List any additional assets received during the Report Period?
* Enter additional asset details?: No

30. Part V, #2 (cont.): Asset type

Click on the **Asset Type** dropdown and select the option that best describes the type of asset you are recording for the IP.

2. List any additional assets received during the Report Period?
* Enter additional asset details?: Yes

Asset Type	Description/Source	Value
Investments (Stocks, Bonds, Mutu...	Savings Bonds	125
SubTotal:		125

29. Part V, #2 (cont.): Click the Add Asset icon

31. Part V, #2 (cont.): Description/ Source

Click in the **Description/Source** field and enter a summary of the asset as provided by the guardian.

32. Part V, #2 (cont.): Value

Click in the **Value** field and enter the amount, in U.S. dollars, that the asset is worth.

33. Part V, #2 (cont.): Add other assets

Repeat Steps 29-32 for all the IP's assets.

How to Enter a Paper-Filed Guardian of the Estate Report



34. Part V, #3: *Add/edit a location?*

If you need to add a location to an asset, continue to Step 35.

If you do not need to add a location to any asset, proceed to Step 36.

3. Where are all the assets deposited or held at the end of the Report Period?

Asset Type	Description	Location	Co-Owner(s)	Value	
Personal Property		Storage Unit		1000	SOLD ↔
Investments (Stocks, Bc	Savings Bonds			125	SOLD ↔
				SubTotal:	
					1125

35. Part V, #3 (cont.): *Location*

Click in the **Location** field and add the address or specific location for any applicable asset.

36. Part V, #4: *Housing*

Click on the dropdown and select 'Yes' or 'No' to specify if the IP owns a house/condo/co-op.

If you selected 'Yes', continue to Step 37.

If you selected 'No', 'Not Answered', or 'Needs Review', proceed to Step 46.

4. Does the Incapacitated Person own a house/condo/co-op?

* Real Estate Ownership:

Address	Does the IP live in the house/condo/co-op?	If purchased during the Report Period, what was the purchase price?	Relation	
417 Maple Ave. Sandy	Yes			+

37. Part V, #4 (cont.): Click the *Add Asset icon*

38. Part V, #4 (cont.): *Address*

Click in the Address field and enter the street address, city, state, and zip code of the IP's house/condo/co-op.

39. Part V, #4 (cont.): *IP's residence?*

Click on the dropdown and select 'Yes' or 'No' to specify if the IP lives in this house/condo/co-op.

40. Part V, #4 (cont.): *Purchase price*

If the house/condo/co-op was purchased during the reporting period, enter the purchase price. If not, leave this field blank.

How to Enter a Paper-Filed Guardian of the Estate Report



41. Part V, #4 (cont.): Sale price

If the house/condo/co-op was sold during the reporting period, enter the sale price. If not, leave this field blank.

43. (Optional) Part V, #4 (cont.): Court order date

Click in the **Court Order Date** field and enter the date of the order that authorized the purchase or sale of the property. Proceed to Step 45.

45. Part V, #4 (cont.): Add other properties

Repeat Steps 37-44 to add any other properties owned by the IP.

47. Part V, #5 (cont.): Asset Transferred icon

Under Part V, #3, click the icon that corresponds to the asset type that was transferred.

Property was sold during the reporting period at the sale price?	Was a court order obtained if property was purchased or sold?	Court Order Date	Explanation
137000	Yes	07/21/2022	

42. Part V, #4 (cont.): Court order?
Click on the dropdown and select 'Yes' or 'No' to specify if a court order was obtained to purchase or sell the property. If 'Yes', continue to Step 43. If 'No', proceed to Step 44.

44. Part V, #4 (cont.): Explanation
Based on the details provided by the guardian, click in the field (not pictured) and enter a summary that explains why court approval was not obtained to purchase or sell the property.

46. Part V, #5 Asset Transferred?
If none of the IP's assets were transferred to a third-party during the reporting year, proceed to Step 55.

If one or more assets were transferred to a third party, continue to Step 47.

Asset Type	Description	Location	Co-Owner(s)	Value
Real Property	Condo			110000
				SubTotal: 110000

How to Enter a Paper-Filed Guardian of the Estate Report



48. Part V, #5

(cont.): Name of third party

In the Transfer Asset popup, click in the **Name of the third Party...** field and enter the name of the person to whom the asset was transferred.

50. (Optional) Part V, #5 (cont.): Court order?

Click on the dropdown and select 'Yes' or 'No' to specify if a court order was obtained to transfer the property. If 'Yes', continue to Step 51. If 'No', proceed to Step 52.

52. (Optional) Part V, #5 (cont.): Explanation

Click in the **Explanation** field and summarize the reasons provided for transferring the property and, if applicable, why the court's permission was not obtained.

54. Part V, #5

**(cont.):
Complete other transfers**

Repeat Steps 47-53 for any other assets that were transferred.

49. (Optional) Part V, #5 (cont.): Relationship to IP

Click in the **Relationship to the IP...** field and specify the recipient's relationship to the IP.

51. (Optional) Part V, #5 (cont.): Court order date

Click in the **Court Order Date** field and enter the date of the order that authorized the asset transfer to the third party.

53. Click SUBMIT

The screenshot shows a 'Transfer Asset' popup window with the following fields and values:

- Asset Type: Real Property
- Description: Condo
- * Name of the third Party to whom asset was transferred to: Joseph Zimmerman
- Relationship to the IP of the third party to whom asset was transferred to: Grandson
- * Value: 110000
- * Was a court order obtained: Yes
- * Court Order Date: 06/08/2022
- Explanation: The property at 417 Maple
- Submit button

Annotations with lines pointing to the form fields:

- A line from the 'Name of the third Party...' instruction points to the 'Name of the third Party...' field.
- A line from the 'Relationship to the IP...' instruction points to the 'Relationship to the IP...' field.
- A line from the 'Court Order Date' instruction points to the 'Court Order Date' field.
- A line from the 'Click SUBMIT' instruction points to the 'Submit' button.
- A line from the 'Explanation' instruction points to the 'Explanation' field.
- A line from the 'Was a court order obtained?' instruction points to the 'Was a court order obtained?' dropdown.

How to Enter a Paper-Filed Guardian of the Estate Report



55. Part VI, #1: Guardian Compensation

Click on the dropdown and select 'Yes' or 'No' to specify if you received compensation for your efforts as a guardian.

If 'Yes', continue to Step 56.

If 'No', 'Not Answered', or 'Needs Review', proceed to Step 64.

58. Part VI, #1 (cont.): Guardian name

Verify that the correct name appears in the **Guardian Name** field automatically or click on the dropdown and select the correct option.

59. Part VI, #1 (cont.): *Free frequency*

Click on the **Fee Frequency** dropdown and select the option that best describes the time interval in which the guardian routinely charged their fees.

Tip: The **Amount** field is sum of all compensation from the reporting year.

Tip: The **If Hourly, # of Hours** field is only used if the **Fee Frequency** is 'Hourly.' If so, enter the total hours worked during the reporting year.

1. Did the Guardian receive compensation during the Report Period?
* Guardian Compensation: Yes

Complete the table below

Guardian Name	Amount	Fee Frequency	If Hourly, # of Hours	
Joseph K Zimmerman	100	Annual		

56. Part VI, #1 (cont.): Click the Add Compensation icon

57. Part VI, #1 (cont.): *Amount*

Click in the **Amount** field and enter the total amount, in U.S. dollars, received in compensation for guardianship services during the reporting year.

60. Part VI, #1 (cont.): *Add other compensation*

Repeat Steps 56-59 for any other guardians that received compensation during the reporting period.

How to Enter a Paper-Filed Guardian of the Estate Report



61. Part VI, #2: Compensation approved?

If the answer to Question #1 above is 'Yes', click on the dropdown and select the appropriate option to specify if the court authorized the compensation to the guardians.

If you selected 'Yes', continue to Step 62.

If you selected 'No', proceed to Step 63.

If you selected 'Not Answered' or 'Needs Review' for Question #1 above, proceed to Step 64.

2. Was the compensation approved by the court?

* Guardian Compensation Approved: Yes

* Guardian Compensation Order Date: 07/20/2022

62. Part VI, #2 (cont.): Court order date

Click in the **Guardian Compensation Order Date** field and enter the date of the order that authorized the compensation. Proceed to Step 64.

63. Part VI, #2 (cont.): Explanation

Based on the details provided by the guardian, click in the field and enter a summary that explains why court approval was not obtained to compensate the guardian.

2. Was the compensation approved by the court?

* Guardian Compensation Approved: No

* Guardian Compensation Explanation:

3. Have you maintained a log of your activities as a guardian?

* Guardian Activity Log: Yes

Please attach a copy using the (Upload Document) button found at the bottom of the page.

64. Part VI, #3: Activities log

Click on the dropdown and select an option to specify if the guardian maintained a log of the activities completed on behalf of the IP.

Tip If you select 'Yes', you can upload a copy of the log, if available, to the Guardian of the Estate report. This can be completed in Step 120. The document must be saved as a PDF.

How to Enter a Paper-Filed Guardian of the Estate Report



65. Part VII, #1: Attorney fees

Click on the dropdown and select 'Yes' or 'No' to specify if fees were paid for attorney services during the reporting year.

If you selected 'Yes', continue to Step 66.

If you selected 'No', 'Not Answered', or 'Needs Review', proceed to Step 76.

66. Part VII, #1 (cont.): Click the Add Attorney Fee icon

67. Part VII, #1 (cont.): Name of counsel

Verify that the correct name appears in the **Name of Counsel** field automatically or click on the dropdown and select the correct person.

68. Part VII, #1 (cont.): Rate vs. total fee

Select this checkbox if you do not have a total fee amount, but have the number of hours the attorney worked on the case and their hourly rate.

If you select this checkbox, continue to Step 69.

69. Part VII, #1 (cont.): Rate

Click in the **Rate** field and enter the amount of money, in U.S. dollars, that the attorney charged per hour to work on the case.

If you have the total fee amount, leave this checkbox unselected and proceed to Step 71.

70. Part VII, #1 (cont.): Hours

Click in the **Hours** field and enter the number of hours the attorney worked on the case. Proceed to Step 72.

How to Enter a Paper-Filed Guardian of the Estate Report



71. Part VII, #1 (cont.): Fee amount

Click in the **Fee Amount** field and enter the total amount, in U.S. dollars, that the attorney charged to work on the case during the reporting year.

PART VII. ATTORNEY'S FEES

1. Were attorney's fees paid during the Report Period?

* Attorney Compensation: Yes

If yes, provide the following information

Name of Counsel	Enter Rate and Hours to compute Fee Amount	Fee Amount	Rate
Blake Joseph	<input type="checkbox"/>	2250	

72. Part VII, #1 (cont.): Court order?

Click on the dropdown and select 'Yes' or 'No' to specify if a court order was obtained to pay attorney fees from the IP's income or estate. If 'Yes', continue to Step 73. If 'No', proceed to Step 74.

73. (Optional) Part VII, #1 (cont.): Court order date

Click in the **Court Order Date** field and enter the date of the order that authorized the use of the IP's income or estate to pay the attorney fees. Proceed to Step 75.

e following information

Hours	Was a court order obtained	Court Order Date	Explanation
	Yes	06/28/2022	

74. Part VII, #1 (cont.): Explanation

Based on the details provided by the guardian, click in the field (not pictured) and enter a summary that explains why court approval was not obtained to use the IP's income or estate to pay for attorney fees.

75. Part VII, #1 (cont.): Add other fees

Repeat Steps 66-74 for any other guardians that received compensation during the reporting period.

How to Enter a Paper-Filed Guardian of the Estate Report



76. Part VIII,#1a: SSA benefits

Select the checkbox if the IP did NOT receive Social Security Administration (SSA) benefits during the reporting year. Proceed to Step 79.

If you did not select the checkbox, continue to Step 77.

78. Part VIII,#1a (cont.): Name of representative payee

Click in the field and enter the name of the person acting as the representative payee of the IP's SSA benefits.

80. Part VIII,#1b (cont.): Fiduciary

Click on the dropdown and select 'Yes' or 'No' to specify if the guardian acted as the fiduciary of VA benefits during the reporting period.

If you selected 'Yes', you can upload a copy of the VA report in Step 120. Proceed to Step 82.

If you selected 'No', continue to Step 81.

If you selected 'Not Answered' or 'Needs Review', proceed to Step 82.

77. Part VIII,#1a (cont.): Representative payee

Click on the dropdown and select 'Yes' or 'No' to specify if the guardian acted as the representative payee of the SSA benefits during the reporting period.

If you selected 'Yes', you can upload a copy of the SSA in Step 120. Proceed to Step 79.

If you selected 'No', continue to Step 78.

If you selected 'Not Answered' or 'Needs Review', proceed to Step 79.

79. Part VIII,#1b: VA benefits

Select the checkbox if the IP did NOT receive Veterans Affairs (VA) benefits during the reporting year. Proceed to Step 82.

If you did not select the checkbox, continue to Step 80.

81. Part VIII,#1b (cont.): Name of fiduciary

Click in the field and enter the name of the person acting as the fiduciary of the IP's VA benefits.

How to Enter a Paper-Filed Guardian of the Estate Report



82. Part IX, #1: Surety bond

Confirm that the information appearing in the first dropdown is accurate.

If a bond was required, confirm the amount ordered, and continue to Step 83.

Otherwise, proceed to Step 88.

84. Part IX, #1a (cont.): Explanation

Based on the details provided by the guardian, click in the field (not pictured) and enter a summary that explains why the surety bond is no longer in effect.

86. Part IX, #1 (cont.): Bond amount increase

Click on the dropdown and select 'Yes' or 'No' to specify if the amount of the surety bond has been increased. If 'Yes', continue to Step 87. If 'No', proceed to Step 88.

83. Part IX, #1a: Bond still in effect?

Click on the dropdown and select 'Yes' or 'No' to specify if the surety bond is still in effect. If 'Yes', proceed to Step 85.

If you selected 'No', continue to Step 84.

85. Part IX, #1b: Value of the Estate

Click on the dropdown and select 'Yes' or 'No' to specify if the estate value has increased. If 'No', proceed to Step 88.

If it defaults to 'Yes', continue to Step 86.

87. Part IX, #1 (cont.): Amount

Click in the **To what amount?** field and enter the new amount of the surety bond.

The screenshot shows the 'PART IX. SURETY INFORMATION' section of a form. It contains the following fields and annotations:

- 1. Was a surety bond required?:** A dropdown menu with 'Yes' selected. A line connects this field to the text for Step 82.
- Surety Bond Required:** A dropdown menu with 'Yes' selected. A line connects this field to the text for Step 83.
- Surety Bond Amount:** A text input field containing '10000'.
- Surety Bond In Effect:** A dropdown menu with 'Yes' selected. A line connects this field to the text for Step 83.
- Is the value of the estate at the end of the Report Period greater than the amount reported on the Inventory or last year's ending balance?:** A dropdown menu with 'Yes' selected. A line connects this field to the text for Step 85.
- * Has the amount of the surety bond been increased?:** A dropdown menu with 'Yes' selected. A line connects this field to the text for Step 86.
- To what amount?:** A dropdown menu with '15000' selected. A line connects this field to the text for Step 87.

How to Enter a Paper-Filed Guardian of the Estate Report



88. Part IX, #2: Liability insurance?

If the filer is a professional guardian, agency, or attorney serving as a guardian, continue to Step 89.

For any other response, proceed to Step 91.

2. If you are a professional guardian, agency or an attorney serving as a guardian, do you have professional liability insurance? * Professional Liability Insurance: Yes

* Are the coverage limits greater than the assets (PART V, Question 3 TOTAL)? Yes

* Describe the deductible and any exclusions: \$15,000 minimum deductible.

89. Part IX, #2 (cont.): Coverage & IP's assets

Click on the dropdown and select 'Yes' or 'No' to indicate if the liability coverage exceeds the total amount of the IP's assets listed under Part V, Question #3.

90. Part IX, #2 (cont.): Deductibles and exclusions

Based on the details provided by the guardian, click in the field and enter the deductible and any exclusions that apply to the guardian's liability coverage.

PART X. GUARDIAN INFORMATION

1. During this Report Period, did any guardian participate in guardianship training or receive or renew a guardianship certification? * Guardianship Training: Yes

If yes, provide the following information:

Guardianship Training/Certification	Guardian Name	Training/Certification

91. Part X, #1: Guardian Information

Click on the dropdown and select 'Yes' or 'No' if the guardian participated in any guardianship-related training or received or renewed a guardianship certification.

92. Part X, #1 (cont.): Click on the Add Training/Certificates icon

If 'Yes', continue to Step 92.

If 'No', 'Not Answered', or 'Needs Review', proceed to Step 100.

How to Enter a Paper-Filed Guardian of the Estate Report



93. Part X, #1

(cont.): Select an option

Click on the **Guardianship Training/Certification** dropdown and select the 'Training' or 'Certification.'

95. Part X, #1

(cont.): Training/certification date

Use the **Training/Certification Date Start** and **End** fields to enter the dates that the training or certification took place.

If you are entering a training, continue to Step 96. For a certification, proceed to Step 97.

Tip: If it was a one-day training, enter the same date in both fields.

97. Part X, #1

(cont.): Description

Based on the details provided, click in the **Description** field and summarize the topics covered.

Proceed to Step 99.

94. Part X, #1

(cont.): Name of guardian

Verify that the correct name appears in the **Guardian Name** field automatically or click on the dropdown and select the correct person.

96. Part X, #1

(cont.): Provider

Click in the **Provider** field and enter the name of the person, organization, or institution that organized and offered the training.

How to Enter a Paper-Filed Guardian of the Estate Report



98. Part X, #1 (cont.):

Certification type

Click on the **Certification Type** dropdown and select the agency that issued the certification.

Information

Period, did any guardian participate in guardianship training or certification?

Guardianship Training: Yes

If yes, provide the following information

Certification Type	Provider	Description
National Certified Guardian (NCG) / Center	National Certi	

99. Part X, #1 (cont.):

Add the training/ certification

Repeat Steps 92-98 for any additional trainings or certifications that were completed by the guardian(s).

Tip If two or more co-guardians completed the same training or received the same certification, each individual's participation should be entered separately.

100. Part X, #2: Judgment or Bankruptcy?

Click on the dropdown and select 'Yes' or 'No' if a judgment was filed against a guardian or a guardian filed for bankruptcy during the reporting year.

If 'No', 'Not Answered', or 'Needs Review', proceed to Step 105.

If 'Yes', continue to Step 101.

Tip A judgment is a court order that resulted from a lawsuit initiated by a person's creditor or debt collector for non-payment.

2. During this Report Period, have any judgments been filed against any guardian, or has any guardian filed for bankruptcy during the reporting year?

* Guardian Bankruptcy: Yes

If yes, provide the following information

Guardian Name	Description

101. Part X, #2 (cont.): Click the Add Judgment icon

How to Enter a Paper-Filed Guardian of the Estate Report



102. Part X, #2 (cont.): Name of guardian

Click on the **Guardian Name** dropdown and select the name of the guardian that received the judgment or filed for bankruptcy.

2. During this Report Period, have any judgments been filed against any guardian, or has any guardian filed for bankruptcy?

* Guardian Bankruptcy: Yes

If yes, provide the following information

Guardian Name	Description	
Joseph Zimmerman	Guardian filed for bankruptcy on 1/27/2022.	

103. Part X, #2 (cont.): Description

Based on the details provided by the guardian, click in the **Description** field and summarize the circumstances surrounding the judgment or bankruptcy.

104. Part X, #2 (cont.): Add other judgments/ bankruptcies

Repeat Steps 101-103 if any co-guardians received a judgment or filed for bankruptcy.

106. Part X, #3 (cont.): Click the Add Guardian Criminal Charges icon

3. During this Report Period, was any guardian charged with or convicted of a crime?

* Guardian Criminal Charges: Yes

If yes, provide the following information

Guardian Name	Description	

105. Part X, #3: Criminal activity?

Click on the dropdown and select 'Yes' or 'No' if any guardian was charged with or convicted of a crime during the reporting year.

If 'No', 'Not Answered', or 'Needs Review', proceed to Step 110.

If 'Yes', continue to Step 106.

How to Enter a Paper-Filed Guardian of the Estate Report



107. Part X, #3 (cont.): Name of guardian

Click on the **Guardian Name** dropdown and select the name of the guardian that was charged with or convicted of a crime.

3. During this Report Period, was any guardian charged with or convicted of a crime?

* Guardian Criminal Charges: Yes

If yes, provide the following information

Guardian Name	Description	
Joseph Zimmerman	On 3/31/22, Joseph was charged with driving	

108. Part X, #3 (cont.): Description

Based on the details provided by the guardian, click in the **Description** field and briefly summarize the nature of the crime.

109. Part X, #3 (cont.): Add other charges

Repeat Steps 106-108 if any co-guardians were charged with or convicted of a crime.

110. Part X, #4: Guardian Service

Click on the dropdown and select 'Yes' or 'No' if there is any reason that any guardian can no longer serve in this role.

If 'No', 'Not Answered', or 'Needs Review', proceed to Step 115.

111. Part X, #4 (cont.): Click the Add Reason icon

4. Is there any reason any guardian cannot continue to serve as a guardian?

* Guardian Cannot Continue: Yes

If yes, provide the following information

Guardian Name	Description	
Joseph Zimmerman	Continued service is no longer in the best int	

If 'Yes', continue to Step 111.

112. Part X, #4 (cont.): Name of guardian

Click on the **Guardian Name** dropdown and select the name of guardian that can no longer serve.

113. Part X, #4 (cont.): Description

Based on the details provided by the guardian, click in the **Description** field and briefly summarize why the selected guardian can no longer serve.

How to Enter a Paper-Filed Guardian of the Estate Report



114. Part X, #4 (cont.): Add other reasons

Repeat Steps 111-113 if there are any co-guardians that also have reasons why they can no longer serve.

PART XI. SUMMARY	
1. If this is the first annual report, state the value of the assets reported on the Inventory. (Amount)	Note
Value of the assets reported on the Inventory: 1801	
2. If this is not the first Report, state the Total Assets (principal) from the prior Report. (TOTAL)	Note
Prior Total Assets: 0	
3. What was the total amount of Income received during the Report Period? (The amount from	Note
Net Income: 9810	
4. What is the total amount of Expenses paid during the Report Period? (The amount from PAR	Note
Total Expenses: 9900	
5. What are the Total Assets remaining at the end of the Report Period? (The amount from PAR	Note
Total Assets: 11125	
6. What is the Unspent Income at the end of the Report Period? (The amount from PART IV of t	Note
Unspent Income: 210	

115. Part XI: Summary

Review the information in this section for accuracy. Each question refers to the source of each amount that displays. If something is incorrect, return to the appropriate section of this report to make the change.

116. Co- guardians?

If there is more than one guardian named on this report under Part I, Question #1, continue to Step 117.

Otherwise, proceed to Step 118.

SIGNATURE AND AFFIRMATION
By answering 'Yes' to this question, I affirm that I possess the consent of all co-guardians of the the information I provide is true and correct. Also, by electronically signing this document, I un
* Co-guardian consent: <input checked="" type="radio"/> Yes <input type="radio"/> No

117. Co-guardians (cont.):

Select the **Yes** or **No** radio button to state whether the signature of the co-guardian(s) appears on the paper report.

Tip If any of the co-guardian's information is incorrect, refer to Step 118 as a guide.

How to Enter a Paper-Filed Guardian of the Estate Report



118. Signature and Affirmation (cont.):

Contact information

Review the guardian's address information.

If any of this information is incorrect, update the guardian's participant record.

Tip The **Signature of Guardian** field represents the handwritten signature provided by the guardian on the paper copy.

Date	Signature of Guardian ?	Name of Guardian	Location	Address Line 1 ?	Address Line 2	Address Line 3	City	State	Zip Code	Territory	Postal Code	Country	Home Phone ?	Office Phone	Ext	Cell Ph
11/26/2022	/s/ Joseph Zimmerman	Joseph Zimmerma	Unit	417 Elm St.			Sai	F	16677			Unit				

Please include any comments you would like to make for this report:

119. (Optional) Signature and Affirmation (cont.):

Comments

If the guardian provided any additional information about the guardianship that was not recorded elsewhere, enter them in the comments field.

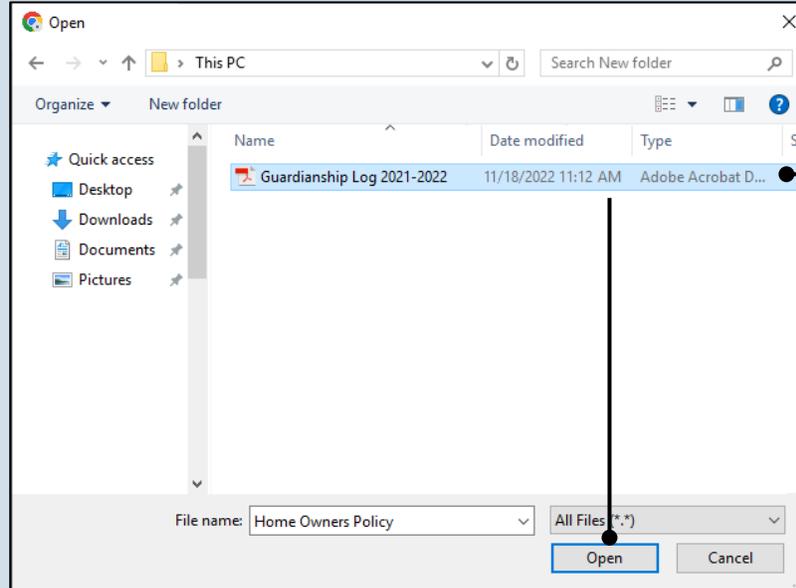
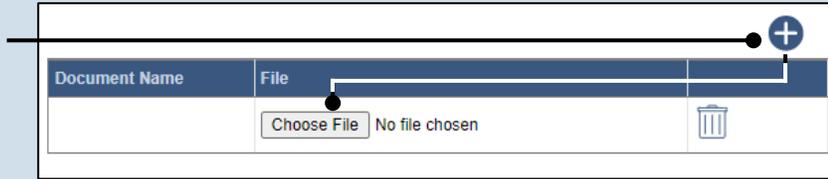
How to Enter a Paper-Filed Guardian of the Estate Report



120. (Optional) Signature and Affirmation (cont.): Documents

If the guardian provided supplemental documents that you want to upload to the report, click the Upload Document icon, then the CHOOSE FILE button, and continue to Step 121.

Otherwise, proceed to Step 122.

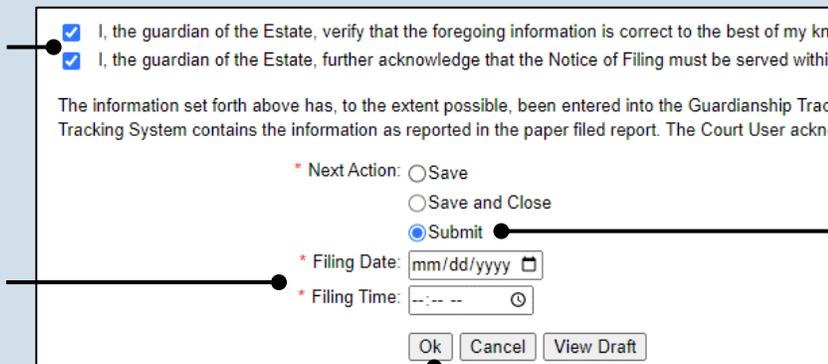


121. Signature and Affirmation (cont.): Documents

In the popup screen that appears, locate the PDF version of the document you have saved on your computer or a movable storage device. Select the file and click OPEN.

Tip GTS only accepts documents in a PDF format.

122. Select the guardian verification checkboxes



124. Enter the filed date/time

Use the **Filing Date** and **Filing Time** fields to specify when the paper report was filed in the court.

123. Select the Submit radio button

125. Click OK