

**A LAYMAN'S GUIDE
to
GUARDIANSHIP AND CONSERVATORSHIP
in GEORGIA**

The Revised Guardianship Code of 2005 and subsequent amendments form the basis of Georgia law related to guardianships and conservatorships of minors and adults. This booklet is designed to provide basic information about the process and procedures for establishing guardianships and conservatorships of children and adults. Topics covered include the following:

Guardianship and Conservatorship of Adults
Guardianship and Conservatorship of Minors
Duties and Powers of Guardians of Adults
Duties and Powers of Guardians of Minors
Duties of Conservators of Adults and Minors
Glossary of Common Terms

NOTE: This booklet is meant only as a simplified guide and should not be considered a definitive statement of the law. If you have any questions, **PLEASE DO NOT HESITATE TO CONSULT A LAWYER.**

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**A
LAYMAN'S GUIDE
to
GUARDIANSHIP
and
CONSERVATORSHIP**

**in
GEORGIA**

Important Information

about

Guardianships and Conservatorships

of

Children and Adults

by

Marion Guess

and

Victoria Gunn

1st Edition - 2008

TABLE OF CONTENTS

CHAPTER	PAGE
1 Guardianship and Conservatorship of Adults	5
What is guardianship of an adult?	
What is conservatorship of an adult?	
How can I determine, if a guardianship or conservatorship of an adult is appropriate?	
Where should I file my petition for an adult guardianship or conservatorship?	
What is the procedure for seeking guardianship or conservatorship of an adult in the probate court?	
Who must be notified of my petition for guardianship?	
Who may serve as guardian or conservator of an adult?	
What happens after I file my petition for guardianship or conservatorship?	
What is a conservator's bond and why is it needed?	
Should I be represented by a lawyer?	
Are there any court costs for filing my petition?	
2 Guardianship and Conservatorship of Minors	12
Who is the natural guardian of a minor?	
What does it mean to be natural guardian of a minor?	
What is temporary guardianship of a minor?	
What is permanent guardianship of a minor?	
What is conservatorship of a minor?	
Do I need an attorney?	
Are there any court costs for filing my petition?	

TABLE OF CONTENTS (cont'd)

CHAPTER	PAGE
3 Duties and Powers of Guardians of Adults What happens after I am appointed guardian of an adult?	16 6 7 24 27
4 Duties and Powers of Guardians of Minors What happens after I am appointed guardian of a minor?	17
5 Duties of Conservators of Adults and Minors What happens after I am appointed conservator? What is an inventory and what is a return? What must be included in an inventory? What must be included in a return? What happens if I do not file my inventory and returns? Can I hire a bookkeeper, accountant, or lawyer to prepare the inventory and return? When preparing a return of receipts and disbursements must I list each expenditure or source of income or can I combine them into categories such as food, medical, housing, etc.? If the assets of the conservatorship change after I have filed my inventory, how do I show the change? If I am filing a second return or any return after the first what should my beginning balance be? Are there any court costs for filing my inventory and returns? How should I hold funds belonging to the conservatorship estate?	18

Am I permitted to use an ATM card to withdraw funds from the conservatorship?
 How may I use my ward's funds?
 How may I invest my ward's funds?
 What is an encroachment?
 Do I get a commission for performing my duties as conservator?

Glossary of Common Terms 24

Appendix (Forms) 27

ACKNOWLEDGEMENTS

Guardianship and Conservatorship of Adults

We wish to thank Professor Mary Radford of the Georgia State University College of Law and Reporter for the Georgia Guardianship Code Revision Committee for her assistance and counsel during the preparation of this booklet. In addition, we would like to thank the managing editor of Chattahoochee Legal Press, Lee Raudonis, for his encouragement and patience. Finally, we would like to thank the Probate Courts of Georgia for their vigilance in guarding the rights of those adults and children who come before the court for guardianship and conservatorship.

Marion Guess, Retired Judge
DeKalb County Probate Court

Victoria Gunn, Attorney at Law

About the authors:

Marion Guess served as the Probate Judge of DeKalb County for more than 30 years before retiring in 2004. Judge Guess served as president of the National College of Probate Judges in 1995 and as president of the Georgia Council of Probate Judges in 2003. He received the Treat Award for Excellence from the National College of Probate Judges in 1999 and was named the outstanding Probate Court Judge of Georgia by the Georgia Council of Probate Judges in 2001. He has served on numerous committees of the Georgia courts and the Georgia Bar. He is publisher of *Georgia Probate Notes*.

Victoria Gunn served as Staff Attorney of the DeKalb County Probate Court for more than ten years. For the past five years she has served as co-editor of *Georgia Probate Notes*. Along with Marion Guess, she maintains a probate consulting law practice, Guess & Gunn, which offers assistance to fiduciary practitioners on a consulting basis.

- A. What is guardianship of an adult?
- B. What is conservatorship of an adult?
- C. How can I determine if a guardianship or conservatorship of an adult is appropriate?
- D. Where should I file my petition for an adult guardianship or conservatorship?
- E. What is the procedure for seeking guardianship or conservatorship of an adult in the probate court?
- F. Who must be notified of my petition for guardianship?
- G. Who may serve as guardian or conservator of an adult?
- H. What happens after I file my petition for guardianship or conservatorship?
- I. What is a conservator's bond and why is it needed?
- J. Should I be represented by a lawyer?
- K. Are there any court costs for filing my petition?

A. What is guardianship of an adult?

Guardianship of an adult is created when a probate court judge makes a determination that an adult's interests would be served by appointing someone to oversee his/her personal actions. This may consist of determining where the person is to live, his/her living conditions, medical treatment, or making any number of personal decisions for the ward. The court may place limitations on the power of the guardian and reserve certain rights to the ward. For example, the ward might retain the right to determine his/her residence. The determination of what rights, if any, should be retained by the ward is made by the court based on the evidence presented at the guardianship hearing.

B. What is conservatorship of an adult?

Conservatorship of an adult is created when a probate court judge makes a determination that an adult's interests would be served by appointing an appropriate person to oversee the ward's finances. The court may place limitations on the conservator's power to control the ward's finances and may allow the ward to retain certain functions, depending on the evidence presented at the guardianship hearing. For example, the ward might retain the right to handle a certain amount of money. There is an additional limitation on the conservator's power over the ward's property in that the conservator must seek the court's permission before taking certain actions with the ward's property. For example, the conservator must seek the court's permission before selling any real estate belonging to the ward.

C. How can I determine if a guardianship or conservatorship is appropriate?

In the case of guardianship, you must be prepared to prove to the court that the adult lacks sufficient capacity to make or communicate significant responsible decisions concerning his or her health or safety and is in need of a guardian. If you don't feel that it can be proved by clear and convincing evidence that the proposed ward meets that standard, you should not file a petition for guardianship.

In the case of conservatorship, you must be prepared to prove to the court that the adult lacks sufficient capacity to make or communicate significant responsible decisions concerning the management of his or her property and is in need of a conservatorship. If you don't feel that it can be proved by clear and convincing evidence that the individual meets that standard, you should not file a petition for conservatorship.

D. Where should I file my petition for guardianship or conservatorship?

The petition for guardianship/conservatorship must be filed in the probate court of the county where the proposed ward is found or

domiciled. However, the probate court of the county where the proposed ward is found is not appropriate if the proposed ward has been moved to that county for the specific purpose of filing the petition for guardianship/conservatorship. Domicile is generally the same as the permanent residence of the proposed ward.

E. What is the procedure for seeking guardianship or conservatorship of an adult in the probate court?

When filing for guardianship/conservatorship use Georgia Probate Court Standard Form #12. The petition must be filed by two petitioners or one petitioner accompanied by the certificate of a physician, clinical psychologist, or a licensed clinical social worker.

The petition, which is made under oath, must give the proposed ward's personal information and state that the proposed ward lacks sufficient capacity to make or communicate significant responsible decisions concerning his/her health or safety (guardianship) and/or lacks sufficient capacity to make or communicate significant decisions concerning the management of his/her property (conservatorship).

The petition must also contain: 1. a statement that the best interest of the adult will be served by appointing someone to act as guardian/conservator, 2. an estimate of the length of time the guardianship/conservatorship will be needed, 3. a recommendation as to the rights and powers which the proposed ward should retain, 4. notification of any health care power of attorney which may have been given by the proposed ward, 5. notification of any financial power of attorney or trust which may have been made by the proposed ward, 6. a statement of any emergency guardianship or conservatorship which affects the proposed ward, and 7. a list of all the property, both real and personal, belonging to the proposed ward.

The petition must state the names, addresses, phone numbers and relationship of those required by law to be notified.

F. Who must be notified of my petition for guardianship or conservatorship?

The spouse and all the living children, if any, of the proposed ward must receive notice if their addresses are known. If there are no living children with known addresses or a spouse whose address is known, the law requires notification of at least two adults from a list of priorities. The priorities are as follows: 1. lineal descendants, 2. parents and siblings, and 3. friends of the proposed ward. The petitioners are not counted when determining the two adults to be notified.

G. Who may serve as guardian or conservator of an adult?

The judge of the probate court has the discretion to appoint the person who he/she finds best serves the ward's interests. The judge may take into consideration the list of preferences (spouse, adult children, or parent, etc.) as to who may be appointed as guardian/conservator but the judge may pass over one with a higher preference and appoint someone with a lower preference or with no preference at all.

Only a natural person may serve as guardian of an adult except in the case of the Department of Family and Children Services or a Public Guardian. In addition to natural persons, banks may be appointed as conservators. A county guardian may also be appointed as a conservator. Generally the person or entity serving must not have a conflict of interest with the ward. This means that the guardian/conservator must not be in a position to benefit himself/herself by being guardian/conservator. The owner, operator, or an employee of a long term care facility may not serve as guardian of a ward residing in the facility unless he/she is related to the ward by blood, adoption, or marriage.

If the ward has nominated someone in the manner prescribed by law to serve as his/her guardian prior to the guardianship petition being filed, the court may not appoint someone else without showing good cause for passing over the person nominated.

A ward will be deemed to have nominated his/her guardian or conservator if he/she has, prior to the guardianship petition being filed, nominated a person as guardian/conservator in a writing witnessed by two persons who sign in the presence of the ward. Georgia's new Advance Directive for Health Care form contains a place to nominate a guardian/conservator.

H. What happens after I have filed my petition for guardianship or conservatorship?

Once the petition is filed with the probate court, the judge must examine the petition and make a finding that there is probable cause to believe that the adult is actually in need of a guardian/conservator. If the judge does not find probable cause to believe the adult is in need of a guardian/conservator, the petition must be dismissed.

If probable cause is found and the petition is allowed to go forward, the judge must immediately notify the proposed ward of the pending proceedings by personal service. The notice must inform the proposed ward of the time and place that he/she will be evaluated by a physician, psychologist, or licensed clinical social worker. The notice must also inform the proposed ward of his/her right to legal counsel and the procedure for appointment of counsel.

The evaluating professional will file his or her report with the court. The judge must then examine the report and make another finding that there is probable cause for the petition for guardianship/conservatorship to proceed to a hearing.

At the hearing, which will generally be held in a courtroom, the court will enforce the civil rules of evidence and the standard of proof will be clear and convincing evidence. The hearing will be adversarial and the proposed ward must be represented by a lawyer.

I. What is a conservator's bond and why is it needed?

A conservator's bond is a promise by an insurance company (surety) to protect the ward's estate against loss because of the failure of the conservator to perform his/her duties according to law. The conservator must acquire the bond by making application to an insurance company which issues such bonds and which are approved by the probate court. A premium will be charged for the bond. The premium may be paid from the ward's estate.

Every conservator is required by law to furnish a bond to the court to insure that the conservator will perform his/her duties correctly and honestly. If the conservator misspends, loses, or in some manner takes the ward's funds to his/her own benefit, the insurance company underwriting the conservator's bond will be required to replace the funds which the court determines are missing or misspent.

The amount of the bond required is the total of the ward's assets, excluding real estate. The court may also require the amount of one year's income to be added to the non-real estate assets when computing the amount of the bond. The initial inventory filed with the petition for conservatorship and any other evidence of assets determined at the conservatorship hearing is used to set the amount of the bond. A conservator may not qualify until he/she has furnished the required bond to the court. Georgia Probate Court Standard Form # 21 may be use when posting a bond with the court.

J. Should I be represented by a lawyer?

The proceedings at the hearing will be adversarial. The proposed ward will either be represented by his/her own lawyer or by a court appointed lawyer. Witnesses will be presented and will be subject to cross examination. The civil rules of evidence will be enforced. If you feel capable of representing yourself against the proposed ward, who will be represented by an attorney, you have that option. However, the better practice would be to have a lawyer.

K. Are there any court costs for filing my petition?

Yes. Filing fees in probate court are set by Georgia law. You should check with the court for the amount and accepted methods of payment.

Guardianship and Conservatorship of Minors

- A. Who is the natural guardian of a minor?
- B. What does it mean to be natural guardian of a minor?
- C. What is temporary guardianship of a minor?
- D. What is permanent guardianship of a minor?
- E. What is conservatorship of a minor?
- F. Do I need an attorney?
- G. Are there any court costs for filing my petition?

A. Who is the natural guardian of a minor?

The parents of a child are his natural guardians. If only one parent is living, he/she is the natural guardian of the child. In the case of divorce, the parent having sole custody of the child is his/her natural guardian. If there is joint custody, both parents are natural guardians and if one dies the other becomes natural guardian. This is also the case in sole custody. If the parent having sole custody dies, the living parent becomes the natural guardian. If the minor is born out of wedlock, the mother is the only natural guardian unless the father has legitimated the minor.

B. What does it mean to be natural guardian of a minor?

Natural guardians, by virtue of their position, have rights which non-natural guardians do not possess. The natural guardian may decide where the minor is to live and be educated and can make health decisions for the child. In addition, natural guardians may, among other things, designate who will serve as permanent guardian, stop the appointment of a temporary guardian for the minor, petition to terminate a temporary guardianship, hold the minor's personal property valued at less than \$15,000 on behalf of the minor, and settle a minor's claim for injury or other type of claim for less than \$15,000.

C. What is temporary guardianship of a minor?

Temporary guardianship was created to allow a guardian to be appointed when there is a living parent or parents who have not either forfeited or relinquished parental rights. There are several circumstances when a temporary guardianship may be appropriate. For example, when the natural guardian is unavailable because of incarceration, mental illness, active military duty, disappearance, or to allow the minor to remain in a particular school district when the natural guardians have moved away.

The person having physical custody of the minor may file for temporary guardianship in the county where he/she resides. Both natural guardians must be notified of the petition for temporary guardianship. If the sole parent or both parents consent to the temporary guardianship, the court will grant the petition and issue letters of temporary guardianship.

If a natural guardian objects to the establishment of the temporary guardianship, the court will dismiss the petition. If either of the parents objects to the person to be appointed, the court will hold a hearing to decide who will be temporary guardian.

A natural guardian may file to terminate the temporary guardianship at any time. After notice has been given, if the temporary guardian does not consent to the termination, the probate court or the juvenile court will hold a hearing on the issue.

The temporary guardianship will terminate when the minor reaches 18 or when the minor or the temporary guardian dies.

If you feel your situation requires the appointment of a temporary guardian you should ask the court personnel for Georgia Probate Court Standard Form # 28.

D. What is permanent guardianship of a minor?

The probate court may appoint a permanent guardian for a minor only if the minor has no natural guardian or any other type of

permanent guardian. If you think that you have a situation which requires permanent guardianship of a minor, you should ask for Georgia Probate Court Standard Form #29. This petition for permanent guardianship requires notice to those who may have an interest in the guardianship, which includes the biological father in the case of a child born out of wedlock.

If the minor is 14 years of age, he/she may select the permanent guardian. In the case of a minor under 14 years of age, the court may consider the wishes of the child. In either case, the selection is not binding on the court if it determines that the best interest of the minor is not served by the appointment of the person selected.

The guardianship will terminate when the minor is 18 years of age.

E. What is conservatorship of a minor?

When a minor is to receive funds or other property it may be necessary for someone to be appointed conservator of the minor's property in order to legally receive the funds or other property. This should be done through the probate court in the county where the minor is found or the county where the conservator is domiciled.

If the amount to be received is less than \$15,000 and you are the minor's natural guardian (see section on natural guardians) you may receive and hold the funds for the benefit of the minor without any court action. You may also settle any debts owed to your minor child, or any claim for injury to your minor child, if the amount of the debt or claim is less than \$15,000 without any procedure through the court.

If the amount to be received by the child is greater than \$15,000, or the minor child already has property which would make the total amount he or she owns greater than \$15,000, then someone will be required to become conservator of the minor child's property.

The court must appoint a conservator who will best serve the interest of the minor. The court may consider but is not bound to appoint someone from the following: 1. the person selected by the minor,

2. the nearest adult relative of the minor, 3. other adult relatives of the minor, 4. other adults related to the minor by marriage, 5. a person chosen in writing by the minor's parents, 6. a person who has provided care and support for the minor, and 7. the county guardian.

If you are seeking conservatorship of a minor you should use Georgia Probate Court Standard Form #30.

F. Do I need an attorney?

If the conservatorship you are seeking is simple you may not need a lawyer. However, if you choose to proceed without a lawyer (*pro se*), it is your responsibility to make a correct determination of the law and to choose the procedure appropriate for the situation.

The probate court staff is not allowed to give legal assistance or provide clerical assistance. They are employed to process the petitions filed with the court and to provide administrative assistance to the judge.

This booklet and the Probate Court Standard Forms are designed to help you perform simple filings on your own. However, if you find that the filing is more difficult than you expected or that you need help in determining which procedure should be filed, you should not hesitate to seek the assistance of an attorney.

G. Are there any court costs for filing my petition?

Yes. Filing fees in probate court are set by Georgia law. You should check with the court for the amount and accepted methods of payment.

Duties and Powers of Guardians of Adults

What happens after I am appointed guardian of an adult?

If you are appointed guardian, it is your duty to make decisions regarding your ward's support, care, education, health, and welfare. It is your duty to make all of these decisions using reasonable care, diligence, and prudence and always to act in your ward's best interest. You must respect the rights and dignity of your adult ward.

As guardian, unless the court has decided that a right should be retained by the ward, you have the power to establish the ward's place of residence, consent to medical care subject to the provisions of the medical consent law, participate in legal proceedings on behalf of the ward, and exercise other powers which are reasonably necessary to provide for the ward's support, care, education, health, and welfare.

There are other powers which you may exercise with court approval. As always, it is wise to consult with an attorney before requesting the exercise of these additional powers from the court.

Annually, you must report to the court on the ward's personal status. In this report you should let the court know the ward's general needs and condition and any changes which have occurred during the past year. You must also make recommendations for any change which you feel should be made in the guardianship. Check with the probate court to see if forms for the personal status report are available.

Duties and Powers of Guardians of Minors

What happens after I am appointed guardian of a minor?

If you are appointed guardian of a minor, the basic relationship is that of parent/child. It is your duty to make decisions regarding your ward's support, care, education, health, and welfare. It is your duty to make all of these decisions using reasonable care, diligence, and prudence and always to act in your ward's best interest. You must respect the rights and dignity of your minor ward.

As guardian you have the right to establish the ward's place of residence, consent to medical care subject to the provisions of the medical consent law, participate in legal proceedings on behalf of the ward, and exercise other powers which are reasonably necessary to provide for the ward's support, care, education, health, and welfare.

There are other powers which you may exercise with court approval. As always, it is wise to consult with an attorney before requesting the exercise of these additional powers from the court.

Annually, you must report to the court on the ward's personal status. In this report you should let the court know the ward's general needs and condition and any changes which have occurred during the past year. You must also make recommendations for any change which you feel should be made in the guardianship. Check with your local probate court to see if forms for the personal status report are available.

Duties of Conservators of Adults or Minors

- A. What happens after I am appointed conservator?
- B. What is an inventory and what is a return?
- C. What must be included in an inventory?
- D. -What must be included in a return?
- E. Are there any court costs for filing my inventory and returns?
- F. What happens if I do not file my inventory and returns?
- G. Can I hire a bookkeeper, accountant, or lawyer to prepare the inventory and return?
- H. When preparing a return of receipts and disbursements must I list each expenditure or source of income or can I combine them into categories such as food, medical, housing, etc.?
- I. If the assets of the conservatorship change after I have filed my inventory, how do I show the change?
- J. If I am filing a second return or any return after the first what should my beginning balance be?
- K. How should I hold funds belonging to my ward?
- L. Am I permitted to use an ATM card to withdraw funds from the conservatorship?
- M. How may I use my ward's funds?
- N. How may I invest my ward's funds?
- O. What is an encroachment?
- P. Do I get a commission for performing my duties as conservator?

A. What happens after I am appointed conservator?

If you are appointed conservator, it is your duty to collect the ward's property and to make decisions about the property belonging to the ward. You must always act in the ward's best interest using reasonable care, diligence, and prudence in making decisions regarding the ward's property.

As conservator, you must file an inventory of all of your ward's property within two months of the date you were appointed. The inventory must list all of the ward's property, both personal and real estate, and tell how the property is titled. Each year, along with a return of receipts and disbursements, you must file an updated inventory. Along with the inventory, you must file a management plan for expending and distributing the ward's assets during the existence of the conservatorship. The management plan must be designed with the ward's best interest in mind. It may include a budget and indicate if there will be any changes in the way any of the ward's assets are titled. The budget may contemplate spending in excess of the ward's income. If your plan is approved by the court, you may spend in excess of the ward's income during the budget period without further court order. The management plan must be updated every year and should be filed along with the annual return.

An annual return of receipts and expenditures must be filed each year within 60 days of the anniversary of your appointment as conservator. As conservator, you must in addition to filing the return with the court mail a copy to the surety company issuing your bond and to the guardian if there is one appointed.

B. What is an inventory and what is a return?

An inventory is a list of all assets belonging to your ward. A return is a statement of all of the receipts and disbursements made to or from the conservatorship during the period covered by the return. There is no standard form for an inventory or return. However, you should contact the probate court to see if there is a form you are required to use. If not, the form appearing in the appendix of this pamphlet can serve as a guide to complying with your obligation to file an inventory and returns.

C. What must be included in an inventory?

All assets must be included in the inventory. This means all real estate, bank accounts, certificates of deposit, stocks, bonds, cash, jewelry, household furnishings, automobiles, boats, and any other property, plus any source of income, such as social security, pension

or rental income. Along with the inventory, a conservator must submit a plan for management of the ward's property which must be approved by the Probate Court. The plan must be updated each year and filed with the annual return.

D. What must be included in a return?

The return must include every receipt of cash during the period covered by the return. For example, it must include all payments of interest, social security, rental income, etc. received by your ward. The return must also contain all disbursements made by you during the period covered. You must list all the things you purchased for your ward. For example, you must list all disbursements for food, clothing, rent, etc.

E. Are there any court costs for filing my inventory and return?

Yes. Filing fees in probate court are set by Georgia law. You should check with the court for the amount and accepted methods of payment.

F. What happens if I do not file my inventory and return?

If you fail to file your inventory and/or return, the probate court will cite you into court to show cause why you should not be removed as conservator for failure to perform your duties. This means that the sheriff will personally deliver to you a citation to appear before the judge. At this hearing you should be prepared to file your inventory and/or returns and to account for all funds held by you. The result of the hearing could be your removal and the convening of an additional hearing to determine if a money judgment will be issued against you. In the best case, you will be responsible for the court costs and sheriff fees after you have made the required returns.

G. Can I hire a bookkeeper, accountant, or lawyer to prepare the inventory and return?

Yes. Georgia law permits a conservator to hire someone to prepare the returns and an inventory and to pay the preparer's fee from estate assets. Even if someone else prepares the return, you will be required to sign the return and swear to its correctness.

H. When preparing a return of receipts and disbursements, must I list each expenditure or source of income or can I combine them into categories such as food, medical, etc.?

Some probate courts require that each receipt and expenditure be listed individually. Other probate courts will accept combining receipts and expenditures of the same nature. You should check with the court to determine which is required. In any event, all cancelled checks and statements should be kept ready to be exhibited to the court on request.

I. If the assets of the conservatorship change after I have filed my inventory, how do I show the change?

You should file an amended inventory showing the changes.

J. If I am filing a second return or any return after the first, what should my beginning balance be?

Your beginning balance on a second or any subsequent return should be the balance remaining on the previous return.

K. How should I hold the funds belonging to my ward?

You should open accounts titled in your name as conservator of the estate, e.g., "John Doe as Conservator of the Estate of Jane Doe, Minor."

L. Am I permitted to use an ATM card to withdraw funds from the conservatorship?

The use of ATM cards to withdraw funds from a conservatorship account is absolutely prohibited.

M. How may I use my ward's funds?

The ward's funds should only be used for maintenance, support, education, or medical care for the ward. If you are also the parent of the ward, the funds cannot be used for the ward until you have satisfied your obligation as parent to maintain, support, and educate the ward.

N. How may I invest my ward's funds?

Georgia law permits a conservator to invest the ward's funds in any investment that appears on a list of "safe" investments without any court approval necessary. Generally, a conservator is limited to investments in obligations of the United States Government, obligations of the State of Georgia, Federal Deposit Insurance Corporation insured bank accounts, and certificates of deposit. If you have any questions about whether an investment is allowed you should consult your attorney. Placing the ward's funds in investments other than those appearing on the "safe" list requires the approval of the probate court. If you wish to invest in something other than the listed investments, it is suggested that you consult an attorney to prepare a petition, have a guardian *ad litem* appointed, provide proper notice, and represent you at any hearing required by the court.

O. What is an encroachment?

You must seek permission (an encroachment) from the probate court before spending any of the principal of your ward's estate unless the court has previously approved a management plan which contemplates the expenditure of principal. Georgia Probate Court Standard Form #20 may be used to request an encroachment.

P. Do I get a commission for performing my duties as conservator?

Yes. Annually you may be entitled to 2 1/2 percent of the cash received by the conservatorship and 2 1/2 percent of the cash paid out. In addition, you are entitled to 10 percent of interest earned. You are also entitled to 1/2 of 1 percent of the market value of the estate each year.

Service: Giving notice to someone who is entitled by law to be notified. Service may be made by the sheriff (personal service) or by publication, by mail, or by a combination of methods.

Sui juris: An individual is *sui juris* if age 18 or over and competent.

Waive: To give up a right.

Ward: An individual for whom a guardian or conservator has been appointed.

APPENDIX

FORMS

Return . . . pp. 28-29

Inventory . . . pp. 30-31

For additional information and forms, visit <gaprobate.org>, the web site of the Judicial Branch of Georgia.

Georgia, _____ County

RETURN

Return of _____ Executor, Administrator or Conservator (Circle one)
Annual Return Final Return (Circle one)

Period from _____ to _____

Estate of _____ Minor, Incapacitated Adult, Deceased (Circle one)

Itemize all receipts and disbursements. You may use as many additional pages as needed.

BALANCE from previous return or inventory \$ _____

RECEIPTS

Description of Receipt	Amount of Receipt
_____	\$ _____
_____	_____
_____	_____
Total Receipts	\$ _____

DISBURSEMENTS

Date, Check Number, List to whom check is paid and the purpose of the payment	Amount of Payment
_____	\$ _____
_____	_____
_____	_____
Total Disbursements	\$ _____

Net Balance on Hand (bank verification required) \$ _____

I certify that after being duly sworn that the above return is a full and true account of the estate of _____ for the period stated to the best of my knowledge and belief and that I have compared the original vouchers with the items listed and certify the return correct.

Conservator, Executor, Administrator (circle one)

Sworn to and subscribed before me this _____ day of _____, 20__.

Notary Public or Clerk of Probate Court

It is ordered that the within return be allowed this _____ day of _____ 20__

Judge of the Probate Court

Georgia, _____ County

INVENTORY

TO THE HONORABLE JUDGE OF THE PROBATE COURT OF SAID STATE AND COUNTY:
The following is a true and complete inventory of the estate, both real and personal, of

_____ (Minor) (Incapacitated Adult) (Deceased),
by _____ (Guardian) (Administrator) (Executor):

<u>ITEM</u>	<u>APPROXIMATE VALUE</u>
1. REAL ESTATE (include address and county where located)	
Parcel One: _____	\$ _____
Parcel Two: _____	_____
Parcel Three: _____	_____
TOTAL APPROXIMATE VALUE OF REAL PROPERTY	\$ _____

2. PERSONAL PROPERTY:

A. Bank Accounts (name of financial institution and account number):

1) Savings:

a. _____

b. _____

2) Checking

a. _____

b. _____

3) Certificate of deposit (name of institution and amount)

a. _____

b. _____

B. Stocks (company and number of shares). Bonds (face amount) and other securities:

1) _____

2) _____

C. Vehicles (autos, boats, trucks, etc.):

1) _____

2) _____

D. Other personal property and personal effects:

3. PROCEEDS FROM SETTLEMENT OF CLAIM:

Gross amount of settlement _____

Approved encroachments/expenses (—) _____

TOTAL paid to estate _____

TOTAL approximate value of personal property _____

Amount of bond posted previously _____

Amount of additional bond posted herewith _____

Number of attached additional pages: _____

SWORN TO and subscribed before me this _____ day of _____, 20____. _____ (Conservator; Administrator; Executor)

NOTARY PUBLIC OR COURT CLERK

ORDERED THAT THE FOREGOING INVENTORY BE RECORDED _____ 20____

JUDGE, PROBATE COURT of _____ County