

Insert Court Examiner's Name

**EXAMINER'S REPORT  
ON GUARDIAN'S INITIAL REPORT  
(MHL §§81.30, 81.32 [a] [1])**

Name and address of Incapacitated Person: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Name and address of Guardian\*: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Index No.: \_\_\_\_\_

Name of Judge or Justice Appointing Guardian: \_\_\_\_\_

Date of Order/Judgment Appointing Guardian: \_\_\_\_\_

Date of Guardian's Initial Report: \_\_\_\_\_

Present Value of Estate: \_\_\_\_\_

Reporting Guardian is: \_\_\_\_\_ Guardian of both Person and Property  
\_\_\_\_\_ Guardian of Person only  
\_\_\_\_\_ Guardian of Property only

If the reporting Guardian is only of the person, there \_\_\_\_\_ is or \_\_\_\_\_ is NOT also a guardian of the property.

Have you \_\_\_\_\_ approved or \_\_\_\_\_ not approved the guardian's report?

1. Was proof of completion of guardian education requirements under MHL § 81.39 filed with initial report?

Yes \_\_\_\_\_ No \_\_\_\_\_

\* As used in this report, the term "guardian" shall also be deemed to refer to committees or conservators appointed prior to April 1, 1993.

**I - PERSONAL NEEDS**

**Complete this section only if guardian has been granted powers regarding personal needs.**

2. Does report contain a report of the guardian's personal visits with the incapacitated person?

Yes \_\_\_\_ No \_\_\_\_

3. Does report set forth the steps the guardian has taken, consistent with the court's order, to provide for the personal needs of the incapacitated person?

Yes \_\_\_\_ No \_\_\_\_

4. Does report set forth the guardian's plan, consistent with the court's order, for providing for the personal needs of the incapacitated person, including the information set forth in MHL § 81.30 (c) (1-4)?

Yes \_\_\_\_ No \_\_\_\_

5. Does report attach a copy of any directive pursuant to Public Health Law § 2965 (Do Not Resuscitate Order) or PHL § 2981 (Health Care Proxy), any living will, or any other advance directive?

Yes \_\_\_\_ No \_\_\_\_

If so, explain briefly.

6. Does report indicate any need for any changes in the powers authorized by the court with respect to personal needs?

Yes \_\_\_\_ No \_\_\_\_

If so, explain briefly.

## **II - PROPERTY MANAGEMENT**

**Complete this section only if guardian has been granted powers with respect to property management.**

7. Does report contain an inventory of the property and financial resources over which the guardian has control?

Yes \_\_\_\_\_ No \_\_\_\_\_

8. Does report indicate the location of any will executed by the incapacitated person?

Yes \_\_\_\_\_ No \_\_\_\_\_

9. Does report set forth the guardian's plan, consistent with the court's order, for management of the property and financial resources of the incapacitated person?

Yes \_\_\_\_\_ No \_\_\_\_\_

10. Does report indicate any need for any change in the power authorized by the Court with respect to property management?

Yes \_\_\_\_\_ No \_\_\_\_\_

If so, explain briefly.

## **III - APPLICATION FOR CHANGE IN POWERS**

11. If report indicates any reasons for a change in the powers authorized by the court, has guardian made application within 10 ten days of filing of report as required by MHL § 81.30 (d)?

Yes \_\_\_\_\_ No \_\_\_\_\_

If application has not been made, please explain briefly.

**IV - COMPENSATION**

12. The compensation for an examiner shall be \$100.00 (see 22NYCRR 1022.32 [c] [1]) plus any reasonable and necessary disbursements. For estates of \$5000 or less, submit a standard state voucher (see 22 NYCRR 1022.32 [c] [4]). For estates of more than \$5000, the compensation shall be payable by the estate in accordance with an Order issued by the Appellate Division, Fourth Department (see 22 NYCRR 1022.32 [c] [5]).

\_\_\_\_\_  
Date of this Report

\_\_\_\_\_  
(your signature)

\_\_\_\_\_  
(your name and address)

\_\_\_\_\_  
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