



Probate Court Fiduciary Training

****Please view the videos listed below prior to accessing the other material and videos in this PDF.**

Adult Guardianship Recorded Training: [Click Here](#)

Partial and Plenary Guardianship of Estate/Person Recorded Training: [Click Here](#)

Minor Guardianship Recorded Training: [Click Here](#)

Simple Accounting Recorded Training: [Click Here](#)

Conservator Recorded Training: [Click Here](#)

What is a guardian?

Let's look at your Letter of Authority...



Developmentally Disabled: <https://courts.michigan.gov/Administration/SCAO/Forms/courtforms/pc662.pdf>

Adult Guardianship: <https://courts.michigan.gov/Administration/SCAO/Forms/courtforms/pc633.pdf>

Minor Guardianship: <https://courts.michigan.gov/Administration/SCAO/Forms/courtforms/pc633.pdf>

Conservatorship: <https://courts.michigan.gov/Administration/SCAO/Forms/courtforms/pc645.pdf>

Types of Guardians



Partial Guardian of a Person - Limited with clarifications by the court.

Plenary Guardian of a Person - Full decisions for individual.

Adult Full: Guardian has full decision making for the benefit of an adult.

Limited Adult Guardianship: Limited plan that allows adult ability to make decisions for themselves with the assistance of a guardian.

Minor Full: Guardian has full decision making for the benefit of a minor child.

Limited Minor Guardianship: Limited with an integration plan for children and parents.

Standby Guardian - Person in line if an appointed guardian is not able to carry out the duties of guardian.

Types of Conservatorship

Partial Guardian of a Estate - Limited with clarifications by the Court to manage assets of an individual. **(DD)**

Plenary Guardian of a Estate - Full decision-making on behalf of the individual to manage assets. **(DD)**

Adult Conservator - Appointed to manage the assets for an individual over the age of 18 years. **(CA) ** This type of conservatorship may have some appointments with specific duties outlined.**

Minor Conservators- Appointed to manage the assets for a minor under the age of 18 years. **(CY)**

Annual Guardian Report

Sample of Guardian Report:

(DD) Click here for a sample: [Completed Sample of DD Guardian Report](#)

(GA) Click here for a sample: [Completed Sample of Adult Guardian Report](#)

(GM) Click here for a sample: [Completed Sample of Minor Guardian Report](#)

Blank Guardian Report Forms:

(DD) <https://courts.michigan.gov/Administration/SCAO/Forms/courtforms/pc663.pdf>

(GA) <https://courts.michigan.gov/Administration/SCAO/Forms/courtforms/pc634.pdf>

(GM) <https://courts.michigan.gov/Administration/SCAO/Forms/courtforms/pc654.pdf>

Always send PC 630 Report of Physician for Adults along with narrative report from the physician. For minor children, provide a narrative physical from the physician. **Send request two weeks to four weeks in advance in order to attach with your report.

<https://courts.michigan.gov/Administration/SCAO/Forms/courtforms/pc630.pdf>

Annual Accounting



Setting up a budget and keeping receipts/records

- Tips for a conservator: [Click Here](#)
- Budget worksheet: [Click Here](#)
- Blank inventory from PC 674 :
<https://courts.michigan.gov/Administration/SCAO/Forms/courtforms/pc674.pdf>
- Blank accounting form PC 583:
<https://courts.michigan.gov/Administration/SCAO/Forms/courtforms/pc583.pdf>
- Sample Inventory and Short Form Accounting:
[Click Here](#)
- Sample manual accounting: [Click Here](#)
- Alternates of preparing accountings:
 - Assisting Services - 989-354-6900
 - Accountant
 - Court staff for simple accounting
 - Attorney
 - Note: All of the above services are not intended for giving legal advice with the exception of an attorney.

Important notes in conclusion of this training:

- Be aware that your authority ends as a guardian and conservator when an individual passes.
- Open a separate account for the ward's income.
- Do not commingle funds.
- Use checks with carbon copy to assist you in preparing your accountings.
- Ask us about our accounting book that is available for \$20. It will assist you and help organize your monthly totals and receipts.
- Use a check when conducting withdraws or note withdraws when using online banking.
- A guardian and conservator is allowed to pay themselves \$60 per month without approval of the Court. All other fees must be approved by the Court such as mileage, additional time, etc.
- Use ink when signing documents.
- Include case number on all documents submitted to the court.
- Kenneth Radzibon is the court appointed attorney.
- Keep all bank statements and receipts in order to prepare your accounting or to have one of our court liaisons assist you.
- Always ask for our assistance on any questions. We are happy to help and direct you to the proper resources.
- Guardians must visit the individual four times per year or once every three months.
- Guardians and conservators are prohibited to designate beneficiaries on policies or financial accounts.
- Guardians and conservators are prohibited to execute a Last Will and Testament on behalf of an individual. You will need seek legal counsel.
- If an individual does not have a prepaid funeral, a guardian and conservator may obtain funeral arrangements. Consult DHHS or the funeral director regarding Medicaid irrevocable prepaid funeral arrangements.
- MI Able accounts and Special Needs Trust can be established to maintain assets for individual under the Medicaid guidelines.
- Contact the DHHS and Social Security Administration when you become a guardian and conservator to establish benefits and/or forward your Letters of Authority.

Thank you!

Additional Resources

Michigan Bar Association:

https://www.michbar.org/public_resources/probate_guardianship

Michigan Legal Help:

<https://michiganlegalhelp.org/>

Michigan Guardianship Association:

<https://michiganguardianship.org/>

Link to Guardianship forms from the Michigan Supreme Court:

<https://courts.michigan.gov/Administration/SCAO/Forms/Pages/Guardian.aspx>

Link to Conservator forms from the Michigan Supreme Court:

<https://courts.michigan.gov/Administration/SCAO/Forms/Pages/Conservator.aspx>

Mi Able Accounts:

<https://www.miable.org/>

Guardianship and Conservatorship Training Manual: [Click Here](#)

What's next ...

- Complete Ward Intake Form: [Click Here](#)
- Complete Testimony Form: [Click Here](#)
- Conservators and Guardians of an Estate: Complete inventory 56 days after appointment.
- Review your duties on the back of your Letters of Authority.
- Guardian reports and accountings are due 56 days after your anniversary.



There are only four kinds of people
in the world - those who have been
caregivers, those who are caregivers,
those who will be caregivers and
those who will need caregivers.

— *Rosalynn Carter* —

AZ QUOTES

Thanks!

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