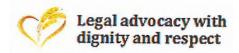
KANSAS GUARDIANSHIP PROGRAM OVERVIEW

The Kansas Guardianship Program is a partnership involving the State of Kansas and citizen volunteers.



VOLUNTEER ADVOCATES NEEDED

The program seeks individuals interested in volunteering for this important advocacy work.

To learn more about the program and how to apply to become a volunteer, visit our website at

www.ksgprog.org or call 1-800-672-0086

Every year many adults in Kansas are declared legally unable to manage their lives and financial affairs. Some individuals have family members who are appointed by the courts to serve as guardians or conservators. There are, however, a significant number of adults who have no family able to or willing to provide the necessary care involved in guardianship or conservatorship.

The KGP recruits citizen volunteers willing to be appointed as guardian or conservator to advocate for and protect the rights of these vulnerable, at-risk individuals. We maintain that if guardianship or conservatorship is imposed, the person should be assured the benefit of someone to act as an advocate and protector.

RESPONSIBILITIES OF A GUARDIAN OR CONSERVATOR

The responsibilities of a guardian or conservator are to:

advocate for and exercise authority as necessitated by the person's limitations.

access services and supports including physical, psychological and emotional care and treatment,

monitor quality of supports and services,

provide necessary paperwork such as court reports and accountings, applications for supports, services and benefits, etc.,

provide necessary consents,

visit ward or conservatee regularly,

manage the finances and estate on behalf of conservatee.

DEFINITIONS Pursuant to K.S.A. Chapter 59, Article 30

Adult with an impairment in need of a guardian or a conservator, or both — any adult person whose ability to receive and evaluate information effectively, or to communicate decision, or both, impaired to such an extent that the person lacks the capacity to manage such person's estate, or to meet essential needs for physical health, safety or welfare, and who is in need of a guardian or a conservator, or both.

Ward – is a person who has a guardian.

Conservatee – is a person who has a conservator.

The goal of the KGP is to provide that qualified, caring and trained volunteers are available throughout the State of Kansas to serve as court appointed guardians or conservators for individuals in need of this level of protection and advocacy and who do not have family members capable of or willing to assume such responsibilities and who meet program eligibility criteria.

CHARACTERISTICS NEEDED IN A GUARDIAN OR CONSERVATOR

It is a significant matter to ask someone to accept both legal and moral responsibility for the well-being of another person — someone who is often previously unknown and not a family member. Nevertheless, the KGP seeks this considerable personal commitment from volunteers who agree to serve as guardians or conservators.

The process of a guardian or conservator becoming an effective advocate takes time and commitment.

The KGP seeks volunteers with the following characteristics.

- compassion
- wisdom
- integrity
- dependability
- self-initiative
- desire to serve as a personal advocate
- interest in learning new information
- ability to make wise and appropriate decision regarding another person

OVERVIEW OF PROCESS

Recruiting Volunteers

KGP recruits volunteers willing to accept appointment by and responsibility to the courts to serve as guardian or conservator.

Training Volunteers

KGP provides one-on-one training and a comprehensive information and reference manual.

Matching and Nomination

KGP matches the abilities and interests of the possible ward or conservatee with those of a volunteer.

Following the Appointment

After the court appointment occurs, the KGP:

- contracts with the volunteer serving as guardian or conservator to provide advocacy and protection,
- requires monthly reports of advocacy activities undertaken on behalf of the person,
- provides a monthly stipend to offset-out-ofpocket expenses to the guardian or conservator for services on behalf of the person,
- provides ongoing training, monitoring, support and assistance to the volunteers.

Referral

DCF adult protective services social workers and KDADS state hospital social workers make referrals to KGP for approved volunteers to be nominated to the court for appointment as guardian or conservator.

Legal Services

DCF and KDADS legal services petitions the court for the determination of possible need for a guardian or conservator.

The District Court determines the need for and level of guardianship or conservatorship services and makes the appointment of the guardian or conservator.

The Kansas Guardianship Program was initiated in 1979 under the administration of Kansas Advocacy and Protective Services, Inc. The 1995 Kansas Legislature established the program as a separate public instrumentality pursuant to K.S.A. 74-9601 et seq., as amended. The KGP is governed by a seven-member board of directors, six of whom are appointed by the Governor and one by the Chief Justice. Funds are provided by the State of Kansas.

Overview Of Procedures Between Kansas Guardianship Program Department for Children and Families – Kansas Department for Aging and Disability Services

Kansas Guardianship Program	APS/SH Social Workers	DCF & KDADS LEGAL SERVICES
Recruit, Screen and Train Volunteer	APS/SH Social Workers	Consultation
Completion of Volunteer Information Form References, criminal history check, ANE Registry Personal Interview with RF Training	Assessment of possible need for G or C Verify eligibility of possible WC adult, no family willing or appropriate financial eligibility (Medicaid & SSBG select)	Available to SW and KGP for consultation throughout process Receives from SW nomination of potential G or C and
	PPS 10600 Referral to KGP	other documentation as required by legal counsel
Nomination - Matching Volunteer with possible W or C Prospective W or C and potential volunteer meet	Nomination - Matching volunteer with possible W or C SW may to accompany volunteer and RF on initial visit	Petitions the court for trial/hearing to determine if person is an adult with an impairment in need of a g or c, or both
May be accompanied by RF	with possible W or C	01 0, 01 00111
If Yes, nomination sent to referring SW Nominee receives next steps information IF No, RF takes next steps to identify new person volunteer	Receives nomination confirmation from KGP Provides DCF & KDADS legal staff with documentation to prepare the case for court	Petitions the court to name a successor G or C
	Court Appointment	Court Appointment
Court Trial/Hearing for Appointment Volunteer presence may/may not be required	SW presence at the hearing may be required to provide testimony regarding need for G or C.	DCF & KDADS legal counsel present case to the court
		Possible Post Appointment Involvement
Post Appointment of G or C)	Post Appointment of G or C Withdraws from case until possible future action	Petitions the court when court approval is required for medical consents or financial transactions
KGP provides:	needed	To medical consens of mandar standardish
A volunteer training handbook for resource Basic Instructions (required by statute) a contractual agreement		Petitions the court to release DCF as surety on the bond when there is change in the status of the ward.
availability of monthly stipend oversight of KGP written monthly reports		Petitions the court to close out the G or C ship upon death of W or C or other person moves out of state
court required reports, accounting forms training, monitoring, information and support throughout the duration of g or c-ship		

LEGAL PROCESS TO ESTABLISH GUARDIANSHIP OR CONSERVATORSHIP IN KANSAS

PROCEDURES FROM PETITION TO APPOINTMENT OF GUARDIAN OR CONSERVATOR

Kansas law intends to provide for orderly legal and judicial procedures that ensure the rights of proposed wards or conservatees. Some of these procedures are especially designed to safeguard the rights of minors, others are for those who may need voluntary conservatorships, while still others are to give due process to those who may become "an adult with an impairment in need of a guardian or conservator."

Petition (K.S.A. 59-3058)

For the appointment of a guardian or conservator the first step is the filing of a petition. The petition is a legal document prepared by an attorney that is filed by any adult asking that the district court appoint a guardian or conservator for an adult or for a minor. This petition includes but is not limited to the name and address of the proposed ward or conservatee, reasons why the need exists, names and addresses of nearest relatives, the extent of the estate of the proposed ward or conservatee, and the names and addresses of those who can provide testimony that the person needs a guardian or conservator.

The petition shall also include the name, age, date of birth, gender, address, place of employment, relationship to the petitioner, if any, of the individual or corporation whom the petitioner suggests the court appoint as the guardian or conservator, and any personal or agency interest of the proposed guardian or conservator that may be perceived as self-serving or adverse to the position or best interest of the proposed ward or conservatee.

Mandatory Orders (K.S.A. 59-3063)

A series of orders are issued by the court upon the filing of the petition. The court shall order the following:

- o an order fixing the date, time, and place of the trial on the petition
- an order requiring that the proposed ward or proposed conservatee appear at the time and place of the trial (unless there is a court finding that the person's presence will be injurious to the person's health or welfare)
- o an order appointing an attorney
- o an order fixing the date, time, and a place for the proposed ward or proposed conservatee to consult with his or her court appointed attorney
- o an order for an examination and evaluation if no report accompanies the petition, or if the court finds that the examination and evaluation does not meet statutory requirements.

Examination and Evaluation (K.S.A. 59-3064)

The examination and evaluation report should contain a description of the person's physical and mental condition, cognitive and functional abilities and limitations, adaptive behaviors, social skills, educational and developmental potential, prognosis for improvement and recommendation for treatment or rehabilitation as appropriate.

The professional completing the report must also state his or her opinion as to whether the person is impaired and in need of a guardian or conservator, or both, and whether the person could meaningfully participate in the proceedings.

Notices (K.S.A. 59-3066)

A series of notices are given by the court to those persons who are involved in the trial. A notice shall be given to the proposed ward or conservatee, to the attorney of the proposed ward or conservatee, and to any other persons whom the court believes it appropriate to notify. Certain persons may be ordered to serve the notice that states that a petition for a trial has been filed, the time and place of the trial, that the proposed ward or conservatee has a right to be present, etc. This notice must be personally served on the proposed ward or conservatee and the attorney of the proposed ward or conservatee not less than ten days prior to the date of the hearing.

Trial (K.S.A. 59-3067)

The trial may be held before a judge or a jury. If the proposed ward or conservatee asks in writing for the trial to be held before a jury, a jury of six persons shall be selected. Whether the trial is before a judge or a jury, the requirement is that the trial shall be conducted in as informal a manner as may be consistent with orderly procedure.

Findings

If at the completion of the trial, the judge or the jury may find that by clear and convincing evidence the proposed ward or conservatee has not been shown to be an adult or a minor with an impairment in need of a guardian or conservator, the court shall terminate the proceedings. If, however, the court or the jury finds by clear and convincing evidence that the proposed ward or conservatee is either an adult or a minor with an impairment in need of a guardian or conservator, the court shall set forth the findings of fact in the court's order and issue the appropriate letters.

Oath of Guardianship or Conservatorship (K.S.A. 59-3069)

Before the letters are actually issued, the individual or the nonprofit corporation that is to be appointed guardian(s) will be asked to file a written oath of guardianship reflecting the guardian will faithfully discharge all duties assigned by the court. The conservator, as a fiduciary, will also be required to file a written oath, that he or she will faithfully discharge all the duties that are assigned by the court.

Bond of Conservatorship (K.S.A. 59-3069)

If the conservator is to assume responsibility for some or all of the estate of the conservatee, the court requires the filing of a bond in such an amount as the court may direct.

Basic Instructional Program for Guardians or Conservators

Every individual appointed as guardian or conservator shall file with the court evidence of completion of a basic instructional program concerning the duties and responsibilities of a guardian or conservator prior to the issuance of letters of guardianship or conservatorship.

Letters of Appointment

Following the filing of the oath the court shall grant letters of guardianship. Following the filing of an oath and the filing of the bond, the court shall grant letters of conservatorship.

Conservator Inventory

Within a thirty-day period after appointment, the conservator, as a fiduciary, shall file with the court an initial inventory of all the property and assets of the estate.

10.2020

BASIC INSTRUCTIONS FOR GUARDIANS AND CONSERVATORS

January 1, 2009

Revised and Updated - 2017

Kansas Judicial Council

Preface

These basic instructions for guardians and conservators were prepared by the Guardianship and Conservatorship Advisory Committee of the Kansas Judicial Council. After their original publication in January 2009, the instructions were revised and updated in June 2015 and again in 2017. The instructions constitute the basic instructional program concerning the duties and responsibilities of a guardian and conservator required by K.S.A. 59-3069(j). After reading these instructions, a proposed guardian or conservator should sign the affidavit of completion at the end of this booklet and file it with the court as evidence of completion of the basic instructional program.

Table of Contents

Definitions Guardian's Powers and Duties	
Conservator's Powers and Duties	
Responsibilities to the Court	
Required Training	5
Oath	
Bond	
Letters	
Guardianship and/or Conservatorship Plans	
Inventory and Valuation	
Annual Accounting	
Special Reports and Accountings	
Reimbursement for Time and Expenses	
How a Guardianship or Conservatorship Ends	8
Conflicts of Interest	
Additional Resources	9
Sample Forms	
Inventory and Valuation - Instructions for Completing 1	0
Sample Inventory and Valuation1	
Annual Accounting - Instructions for Completing1	
Sample Annual Accounting	
Sample Report on Condition of Guardian's Ward2	1
Affidavit of Completion of Basic Instructional Programlast pag	је

BASIC INSTRUCTIONS FOR GUARDIANS AND CONSERVATORS

Definitions of Words You Need to Know:

Guardian - A guardian is a person appointed by a court to act on behalf of a minor or impaired person, who is called a "ward." A guardian manages a ward's personal health, safety, and welfare.

Ward - A ward is a person for whom a guardian has been appointed. A ward may be either a minor or an adult person with an impairment.

Conservator - A conservator is a person appointed by a court to act on behalf of a minor or impaired person, who is called a "conservatee." A conservator manages a conservatee's property or "estate," such as money, personal and real property.

Conservatee - A conservatee is a person for whom a conservator has been appointed. A conservatee may be a minor, an adult person with an impairment, or a person who has voluntarily requested a conservatorship.

Accounting - A detailed written summary of all financial actions done by the conservator on behalf of the conservatee.

Bond - A bond is similar to an insurance policy and is usually purchased from an insurance company. It is intended to protect the conservatee's property should the conservator mismanage the person's estate.

NOTE: Sometimes, a person is appointed as both a guardian and conservator. In that case, the person they are helping may be called either a ward or conservatee, or both.

What Are a Guardian's Powers and Duties?

The basic duties, responsibilities, powers and authorities of guardians are defined by statute and can be found at K.S.A. 59-3075. The following is a general overview.

A guardianship is a legal proceeding filed to protect an impaired person, who is called a "ward." A guardian manages a ward's personal health, safety, and welfare. If the court appoints you as guardian your job is separate from the duties of a conservator, though the court may appoint the same person to serve in both roles. As guardian you are always subject to the control and direction of the court. After a hearing to determine whether a guardianship is necessary, a court order will be issued. Your attorney should

provide you with a copy of that court order.

State law and the court define a guardian's power and set the rules to be followed when caring for the ward. At all times, a guardian is under the court's direction and control. A guardian must always act in the ward's best interest and use reasonable care and attention. EACH YEAR THE GUARDIAN MUST FILE A REPORT WITH THE COURT TELLING THE COURT ABOUT THE GUARDIAN'S ACTIONS AND THE WARD'S CONDITION.

As a guardian, your job is to get to know the ward and the ward's family, friends, and care givers. You should use your authority only as needed and allow the ward to take part in decisions. You should consider the ward's personal desires and values when making decisions on the ward's behalf. You should encourage the ward to make decisions, develop skills for daily living, and do as much as the ward can on his or her own.

The law does **NOT** require you as guardian to use your own personal money or other assets for support of the ward solely because you have been appointed as guardian. **However**, if you are the parent or spouse of the ward, you may have a personal duty to support the ward. For example, each parent has a legal duty to support his or her minor child by paying the ordinary expenses of the child's care, treatment, housing and education.

You are not liable to other persons for the acts of the ward solely because you have been appointed as guardian. This means you are not responsible to anyone else for something that the ward has done simply because you are the guardian.

You should protect the ward's personal, civil, and human rights. The law requires that you **MUST ALWAYS** act in the best interest of the ward and exercise reasonable care, diligence, and good sense.

A guardian has the following general duties, responsibilities, powers and authorities, which may be exercised without getting additional court approval:

- 1. If the ward is a minor, to have custody and control of the minor and to provide for the minor's care, treatment, housing, education, support and maintenance;
- 2. If the ward is an adult, to take charge of the person of the ward and to provide for the ward's care, treatment, housing, education, support and maintenance;
- 3. To consider and either provide on behalf of the ward necessary or required consents or refuse the same (e.g. release of medical records; consent to services and supports provided);
- 4. To assure that the ward lives in the least restrictive setting that meets the ward's needs and is reasonably available;
- 5. To assure that the ward receives all necessary and reasonably available medical

- care or services to preserve the ward's health. This also includes assisting the ward to develop or retain skills and abilities;
- 6. To consent to experimental procedures only if approved by an institutional review board or committee;
- 7. To protect the health, safety and welfare of the ward;
- 8. To revoke a durable power of attorney for health care decisions; and
- 9. To make necessary arrangements for the ward's funeral, burial or cremation.

As a guardian, you may NOT take any of the following actions UNLESS the supervising court issues a written order approving the action(s):

- 1. Consent to adoption of the ward;
- 2. Consent to any psychosurgery, organ or limb removal except in a life threatening emergency or to prevent lasting impairment to the ward's physical health;
- Consent to sterilization of the ward;
- 4. Consent to withholding or withdrawal of life-saving medical care unless the ward previously made a written advance directive (living will, durable power of attorney for health care decisions, or similar document) that meets legal requirements;
- 5. Have any control over the ward's property, unless the Letters of Guardianship authorize you to do so **AND** the value of the ward's property is less than \$10,000;
- 6. Place the ward in a psychiatric treatment facility;
- 7. Access digital assets of the ward, such as online accounts, pictures and music stored electronically, social media accounts, etc.;
- 8. Pay the guardian or the guardian's attorney a fee; or
- 9. Dispose of property after the ward's death.

As a guardian, you may NEVER take any of the following actions:

- 1. Prohibit the marriage or divorce of the ward; or
- 2. Consent to termination of the ward's parental rights.

What Are a Conservator's Powers and Duties?

THESE DUTIES APPLY TO BOTH VOLUNTARY AND INVOLUNTARY CONSERVATORSHIPS

The basic duties, responsibilities, powers and authorities of conservators are defined by statute and can be found at K.S.A. 59-3078. The following is a general overview.

A conservatorship is a lawsuit filed to protect the property of an impaired person, who is called a "conservatee." After a hearing to determine whether a conservatorship

is necessary, a court order will be issued. Your attorney should provide you with a copy of that court order. Before the court will issue you Letters of Conservatorship, you must be bonded unless the court waives the bond. If the court appoints you as conservator, your responsibilities are separate from the duties of a guardian and your job is to manage the conservatee's property. The conservatee's property is called his or her "estate." As conservator, you are always subject to court control and direction.

State law and the court define your power, as conservator, and set the rules you must follow when managing the conservatee's property. As conservator, you must always act in the best interest of the conservatee.

Your first duty, as conservator, is to open a bank account under the conservatee's social security number, titled in your name "as conservator" for the conservatee. You will then need to file an inventory (a detailed list) of all assets in the conservatee's estate within 30 days of issuance of the Letters of Conservatorship. NEVER combine the conservatee's assets with those of another person, including your own. THE CONSERVATOR MUST FILE AN ACCOUNTING WITH THE COURT EACH YEAR.

You must know the conservatee's needs, and you must also support and involve the conservatee in decision-making regarding his or her property. You should consider the conservatee's stated desires and personal values when making decisions for him or her. You must try to avoid conflicts of interest and protect the conservatee's personal, civil, and human rights.

The law does **NOT** require you as conservator to use your own personal money or other assets for support of the conservatee solely because you have been appointed as conservatee. **However**, if you are the parent or spouse of the conservatee, you may have a personal duty to support the conservatee. For example, each parent has a legal duty to support his or her minor child by paying the ordinary expenses of the child's care, treatment, housing and education.

You are not liable to other persons for the acts of the conservatee solely because you have been appointed as conservator. This means you are not responsible to anyone else for something that the conservatee has done simply because you are the conservator.

A conservator has the following general duties, responsibilities, powers and authorities, which may be exercised without getting additional court approval:

1. To pay reasonable charges for the support, care, clothing, housing, and education of the conservatee in a reasonable manner, unless the conservatee's parent or spouse is required by law to pay those charges;

- 2. To pay all lawful debts of the conservatee;
- 3. To control and manage all the conservatee's property and collect debts and assert claims in favor of the conservatee (for example, if the conservatee is owed money);
- 4. To insure property against theft or other loss in a reasonable amount;
- 5. To pay the premium for your conservator's bond; and
- 6. To revoke a durable power of attorney for financial decisions.

The following actions ALWAYS require WRITTEN court approval. As conservator, you may NOT take any of the following actions unless the supervising court issues a written order approving the action(s):

- 1. Pay, or reimburse a parent of a minor conservatee for paying, any obligation imposed by law upon the parent for the ordinary expenses of the minor conservatee's care, treatment, housing or education.
- 2. Settle any claim of the conservatee for less than full value;
- 3. Sell or transfer the property of any ongoing businesses;
- 4. Sell, convey, lease, or mortgage the conservatee's homestead or other real estate:
- 5. Lease or convey possession in any real estate for more than 3 years;
- 6. Sell, convey, or mortgage any oil, gas, or other mineral interests;
- 7. Sell, convey, lease, or mortgage any interest the conservatee may have in real estate belonging to the conservatee's spouse;
- 8. Extend an existing mortgage for more than 5 years, which includes both mortgages where the conservatee is the borrower or the lender;
- 9. Make a gift on behalf of the conservatee;
- 10. Access digital assets of the conservatee, such as online accounts, pictures and music stored electronically, social media accounts, etc.; or
- 11. Pay the guardian, the conservator, or the guardian's or conservator's attorney a fee.

The following actions MAY require court approval. As conservator, you should get court approval before taking any of the following actions:

- 1. Sell the conservatee's personal property as necessary;
- 2. Manage any ongoing business;
- 3. Invest funds in a conservative and reasonable manner, including purchasing an insurance policy or annuity, reserving to the conservatee the right to change the beneficiary on termination of the conservatorship;
- 4. Prosecute and defend all actions in the name of the conservatee; or
- 5. Dispose of property after the death of the conservatee.

What Are a Guardian and Conservator's Responsibilities to the Court?

Required Training

Before you are appointed as guardian and conservator, you must complete a basic training program about the duties and responsibilities of a guardian and conservator. Reading this booklet meets that requirement. At the end of this booklet, you will find an affidavit of completion of the basic training program (a form stating you have read the booklet). When you finish reading this booklet, you should sign the affidavit and file it with the court to prove that you have completed the program. You should also keep this booklet for future reference.

Oath

When you are appointed as guardian and conservator, the court will require that you file an oath or affirmation stating that you will faithfully, impartially and to the best of your ability fulfill all duties assigned by the court. The oath must be in writing and signed before a notary or the judge.

Bond

When you are appointed as conservator (and sometimes as guardian), you must be bonded unless the court waives the bond. A bond is intended to protect the conservatee's property should the conservator mismanage the person's estate. The court will determine the amount of the bond and whether sureties are necessary. Bonds are usually purchased from an insurance company with the assistance of an insurance agent. To keep the bond in effect, you must pay a yearly premium (fee). You will be released from the bond **only after** the court has approved your actions and final accounting and has ended the conservatorship.

Letters

After you have filed your oath and affidavit of completion of the basic training program, the court will issue Letters of Guardianship and Conservatorship. This document gives you the authority to carry out your legal duties. You should ask for a certified (legal) copy of the original document, which is on file with the court. You should keep the certified copy in a safe place and provide copies of the Letters of Guardianship and Conservatorship to anyone you deal with who provides services to the ward or conservatee.

Guardianship and/or Conservatorship Plans

In some cases, the court may require, or your attorney may suggest, that you file a guardianship or conservatorship plan. A guardianship plan might include provisions about where a ward will live and what kinds of decisions the ward will be allowed to

make on his or her own. A conservatorship plan might include provisions about how much money a conservatee will be allowed to control and how the conservator plans to protect the eligibility of the conservatee for public benefits. Guardianship and conservatorship plans are most useful in situations where the ward or conservatee is capable of making some decisions independently.

Inventory and Valuation

A conservator (and sometimes a guardian) is required to file with the court an inventory and valuation (statement of worth) of the property and assets of the conservatee's estate, including any sources of regular income. This must be done within 30 days of issuance of the Letters of Conservatorship. The inventory and valuation describes the conservatee's estate at the time the conservatorship begins. You must list and describe each property and asset separately and give its full and fair value. You may need to obtain an independent appraisal of some assets. A sample of the inventory and valuation is included at the end of this booklet.

Annual Accounting

A conservator (and sometimes a guardian) is required to file a detailed accounting every year of both income and payments made on behalf of the conservatee. The reporting period usually starts when the conservator is appointed and covers a 12-month period of time, unless the judge orders a different reporting time period. If a conservator fails to file the required accounting, the court may compel the conservator to appear and take actions to remove that person as conservator. A sample of the annual accounting is included at the end of this booklet.

Guardian's Annual Report on the Ward's Condition

Because the court needs to know where the ward is living and how the ward is doing, a guardian must file a report on the ward's condition every year. This report is required even if there is no change in the ward's condition. The reporting period usually starts when the guardian is appointed and covers a 12-month period of time, unless the judge orders a different reporting time period. If a guardian fails to file the required annual report, the court may compel the guardian to appear and take actions to remove that person as guardian. A sample of the annual report is included at the end of this booklet.

Special Reports and Accountings

A guardian and conservator must file a special report or accounting with the court if any of the following occurs:

1) a change of address of the guardian or conservator;

- 2) a change of residence or placement of the ward or conservatee;
- 3) a significant change in the health or impairment of the ward or conservatee;
- 4) in the case of a guardianship, if the ward acquires any real property, or if the ward receives or accumulates other property or income which causes the total value of the ward's estate to equal or exceed \$10,000;
- 5) a change in the circumstances of the guardian, conservator, ward or conservatee that may constitute a conflict of interest; or
- 6) the death of the ward or conservatee.

You should also inform the court if your telephone number or email address changes.

If the ward or conservatee dies, you will need to complete a final report on the ward or conservatee's condition as well as a final accounting of the ward or conservatee's assets and have that accounting approved by the court so that the court can close the case.

Reimbursement for Time and Expenses

The court must approve in advance any reimbursement to the guardian and conservator for expenses and time spent on official duties. If you want to be paid back for your time and expenses, you must keep a detailed timesheet of time spent and a detailed record of expenses incurred. Many guardians and conservators do not claim such expenses, especially if the ward or conservatee is a family member, and perform their duties out of love and affection. If you want to receive reimbursement, you should talk to your attorney and bring this up preferably at the first court hearing.

How Does a Guardianship or Conservatorship End?

A guardianship or conservatorship never ends automatically. The court may end a guardianship or conservatorship for a number of different reasons, including when the need for it no longer exists, when the ward or conservatee has turned 18 (and was not determined to be a minor with an impairment) unless the court has extended the conservatorship beyond the conservatee's 18th birthday, or when the ward or conservatee has died. At any time, any person including the ward or conservatee may file a petition asking the court to end the guardianship or conservatorship for any of the reasons listed above.

The court may also end a guardianship or conservatorship because the ward or conservatee is no longer impaired. At any time, the ward or conservatee may file a petition asking the court to find that he or she is no longer impaired and requesting to be restored to capacity.

If the court ends a guardianship or conservatorship, the court will enter appropriate orders to close the case.

What are Conflicts of Interest?

A conflict of interest happens when your personal or financial interests as guardian and conservator go against those of the ward or conservatee or where your actions appear to be self-serving (for your own benefit). For example, it would be a conflict of interest for a guardian and conservator to get a loan from or buy property belonging to the conservatee's estate. It could also be a conflict of interest for a guardian and conservator to work in the same facility where the ward lives.

Whenever you think you might have a conflict of interest, even if you are not sure, report it to the court. Just because you may have a conflict of interest does not mean you cannot serve as guardian and conservator, as long as you keep the court informed.

Additional resources:

If you have questions about any of your duties as a guardian and conservator, ask your attorney.

Additional resources, including blank forms for inventories, accountings, and guardian's reports, can be found on the Kansas Judicial Council's webpage at: www.kansasjudicialcouncil.org

CONSERVATOR INVENTORY AND VALUATION Instructions for Completing

Definition

A detailed list or inventory of the conservatee's estate (property and financial resources) at the time of appointment of a conservator.

Filing Procedures

The inventory is filed with the court within 30 days of the appointment date.

Preparing Documents for the Court

This document is a permanent legal record. The information should be typed or written legibly. Use black or dark blue ink when reports are handwritten.

Supplementary Inventory and Valuation may be filed to change or add information.

ASSESSING VALUES

Jointly Owned Property

For both real and personal property, indicate if the property is jointly owned and give the name of the co-owner(s) and the form of ownership. Report the full value of the property, not just the portion owned by the conservatee.

Real Estate

Provide an address and description and the appraised value of the property. The property description is available from the local Register of Deeds office. The appraised value is available from the County Treasurer or Appraiser's office.

Furniture / Household Goods / Wearing Apparel / Jewelry

Furniture, household goods, and wearing apparel may be listed as a combined value. However, individually valuable items such as antiques, jewelry, coins, electronics, etc. should be listed separately. For assistance with appraisals on items of value, contact a credible antique dealer or auctioneer.

Insurance

Provide the cash value of all insurance policies.

Add additional lines or pages as needed to provide complete documentation.

IN THE 32nd JUDICIAL DISTRICT DISTRICT COURT OF APACHE COUNTY, KANSAS

Gι	the Matter of the) uardianship and Conservatorship) Samuel G. Crown)	Case	e No	
Pr)) oceeding Pursuant to K.S.A. Chapter 59			
	INVENTORY AND VALUATION			
	REAL ESTATE (Indicate if property is jointly owned and with w	vhom)		
	Address and Description		Value	
1.	39 Solar Haven Rd., Lot 59, Solar Haven Addition, Sanesville, KS 66666 (joint tenancy with Betty Crown)	\$	45,489.00	
	Total Real Estate	\$:	45,489.00	
	PERSONAL PROPERTY (Indicate if property is jointly owned and with w	vhom)		
Ca	sh / Checking and Savings Accounts / Certificates of D	Depos	sit	
	Description		Amount	
1. 2. 3.	Checking Account, Savers Union Bank, Sanesville, KS Savings Account, Savers Union Bank, Sanesville, KS CD, Savers Union Bank	\$ \$ \$	1,178.00 8,978.00 4,329.00	
Sto	ocks / Bonds / Investments / Retirement Accounts / An	nuitie	es	
	Description	•	Value	
1.	N/A	\$	0	
Vel	nicles / RVs / Boats / Trailers			
	Description		Value	

1. 2006 Toyota Camry

\$ 6,000.00

Furniture / Household Goods / Wearing Apparel / Jewelry

	Description	Value
1.	Household furnishings	\$ 4,500.00
2.	Wearing Apparel	\$ 500.00

Other Assets

(For example: interest in a business entity; oil & gas lease or interest; agricultural lease interest and accounts in cooperatives; livestock; equipment; debts owed to the conservatee; interest in a trust; life insurance; long term care insurance; funeral or burial plan; burial plot)

	Description		Value
3.	Red Shield life insurance (cash value) Funeral & burial trust, Timberline Mortuary, Sanesville, KS Antique gun collection Lawn mower and tools	\$ \$ \$	10,000.00 4,250.00 1,500.00 300.00
	Total Personal Property	\$	41,535.00

DEBTS AND LIABILITIES

Mortgages / Liens / Loans / Credit Card Debt

	Description		Amount
1.	Mortgage on 39 Solar Haven Rd. (The conservatee and his wife, Betty Crown, are jointly liable on the mortgage.)	\$	20,000.00
2.	Bank of America Visa credit card (The conservatee's wife, Betty Crown, has possession of the card		,
	and pays the bill.)	\$	2,000.00
	Total Debts and Liabilities	\$ _	22,000.00

RECAPITULATION

Total Real Estate Total Personal Property Less Total Debts and Liabilities		\$ 45,489.00 41,535.00 (22,000.00)
	Total Estate	\$ 65,024.00

SOURCES OF REGULAR INCOME

(For example: social security benefits, supplemental security income; pension or retirement income; trust or annuity payments; veterans benefits; farm or rental income; oil and gas income; child support or alimony; interest)

	Description	Amount	How Often Received
1.	Social Security disability insurance	\$ 415	per month
2.	KPERS retirement	\$ 685	per month
3.	Veterans benefit	\$ 380	per month
4.	Bank account interest	amount varies	S

I declare under penalty of perjury under the laws of the state of Kansas that the foregoing is true and correct. Executed on June 30, 2013.

Conservator	

ANNUAL CONSERVATOR ACCOUNTING Instructions for Completing

This is a report of all income (receipts) and disbursements (expenses) of the estate transacted during the accounting period. It also updates the inventory and valuation.

The accounting is submitted to the court once a year either on the anniversary date of the appointment of the conservator, or, on a calendar year basis. This varies by county. File the accounting within 30 days of the end of the accounting period.

Record Keeping

Keep the following financial information to prepare an accurate accounting:

- Bank statements, check book register, copies of cancelled checks
- Receipts of items purchased
- Financial reports from trust accounts

COMPLETING THE ACCOUNTING

- 1. The accounting is a permanent legal record. The form should be typed **OR** written legibly. Use black or dark blue ink when reports are handwritten.
- 2. Work from bank statements to prepare the accounting using the check register for support information.

3. Attachments - Financial Statements from a Provider

If the person lives in a facility, or the provider is the payee for the conservatee's benefits, some courts will accept an attachment of the monthly or quarterly financial statements from the provider. Check the math accuracy before attaching to the accounting.

Computer Generated Financial Spread Sheets

Some courts will accept an accounting generated by a computer program. Courts may have a format preference for how information is presented. Generally, there are two acceptable formats:

Format 1 - Spread Sheet

Set up looks like the check book register and includes a running balance of "cash on hand." Advantage: The accounting may be easily prepared from the bank statements.

Format 2 - Spread Sheet

Columns totaling income, disbursements and a final balance of cash on hand.

I. STATEMENT OF RECEIPTS (INCOME) AND DISBURSEMENTS (EXPENSES)

Balance Carried Forward

If an accounting was filed for the previous year - The "balance carried forward" should be the same amount as the "balance on hand" from the previous year accounting.

If no accounting was filed for the previous year - The balance carried forward is the <u>cash balance</u> on the initial Inventory and Valuation.

Receipts (Income)

Itemize receipts from all sources received in the accounting period. Add additional pages if needed.

Fill in all the information required on the form. Income for the same amount may be documented in lump sums. Refer to Sample Accounting.

Disbursements (Expenditures)

Itemize all money spent during the accounting period. Add pages if needed.

Fill in all the information required on the form. Expenses for the same amount (*i.e.* cable, or phone) may be documented in lump sums. Refer to Sample Accounting.

Summary

List the total receipts and the total disbursements. The cash balance is the difference between the total receipts and total disbursements.

II. INVENTORY

Real Estate - List any real estate including the appraised value.

Personal Property

List account balances as of the end of the accounting reporting period, and value of all other assets. Document any newly purchased assets such as a TV, bicycle or furniture.

Total the personal property.

Add the Total Personal Property and Total Real Estate, and put the amount on the **Total Real Estate and Total Personal Property line**.

Debts and Liabilities

Total all debts and liabilities, and subtract that number from the Total Real Estate and Total Personal Property to find the Total Estate value.

IN THE 32nd JUDICIAL DISTRICT DISTRICT COURT OF APACHE COUNTY, KANSAS

Guardianship and Conserv of Samuel G. Crown	atorship)		Case No
Proceeding Pursuant to K.S	S.A. Chapter 59		
	X ANNUAL	_ FINAL	ACCOUNTING
Marjorie Crestone	3299 Sm	ithville Road	, Apt #4
Name	Address		
Sanesville, KS 66666	(785) 999	9-7100	mcrestone@gmail.com
City & Zip Code	Telephon	e Number	Email Address
conservator in the above-er	ntitled estate sub	omits the follo	owing annual accounting in the

for the period from July 1, 2013 to June 30, 2014.

In the Matter of the

Samuel G. Crown

Name

I. STATEMENT OF RECEIPTS AND DISBURSEMENTS

39 Solar Haven Rd., Sanesville, KS 66666

Address, City & Zip Code

1942

Year of Birth

RECEIPTS (Income)

DATE	RECEIVED FROM	EXPLANATION	AMOUNT
	Balance Carried Forward	Checking Account	\$1,050.00
July - Dec 2013	Social Security Admin.	\$ 415 X 6 mos	2,490.00
Jan - June 2014	Social Security Admin.	\$ 425 X 6 mos	2,550.00
July - June 2014	Veterans Affairs	\$ 380 x 12 mos	4,560.00
July - June 2014	KPERS Retirement	\$ 685 x 12 mos	8,220.00
July - June 2014	Savers Union Bank	Yearly Checking Account Interest	16.98
July - June 2014	US Treasury	IRS Tax Refund - Earned Income Credit	75.00
May 28, 2014	Crown Savings Account	Transfer of Funds	1,000.00
June 15, 2014	Savers Union Bank	Cashed Certificate of Deposit	2,000.00
		Total Receipts (Including balance carried forward)	\$ 21,961.98

DISBURSEMENTS (Expenses) from Checking Account

DATE	Check #	PAID TO	PURPOSE	AMOUNT
07/13-06/14		Savers Union Bank	Monthly Mortgage - Incls Insurance (\$568 x 12 mos)	\$6,816.00
07/13-06/14		Westar Energy	Electrical Utility (Average Payment Plan \$55 x 12)	660.00
07/13-06/14		City Water Dept	Water and Sewage (\$35 x 12 mos)	420.00
07/13-06/14		KS Gas Service	Gas Utility (Equal Payments Plan \$70 x 12)	840.00
07/13-06/14		Ripple City Cable	Cable Bill (\$38.50 x 12 mos)	462.00
07/13-06/14		Birch Telephone	Phone (\$41.89 per month X 12 mos)	502.68
07/13-06/14		Sanesville Life Line	Medical Alert (\$19.99 x 12 mos)	239.88
07/13-06/14		BCBS Insurance	Supplemental Insurance (\$97.45 x 12 mos)	1,169.40
07/13-06/14		Pelley Pharmacy	Prescription Co-pay	168.00
07/13-06/14		Tuppence Foods	Groceries \$65 x 52 wks (Per Conservator Plan)	3,380.00
07/13-06/14		Samuel Crown	Spending Money (\$100/mo x 12) (Conservator Plan)	1,200.00
07/14/13	#2498	K-Mart	Socks, personal hygiene produces, video	130.00
07/13-06/14		Barber of Saville	Haircuts (\$10 x 12 mos)	120.00
07/14/13	#2501	Seniors Travel	Public Transportation (12 books x \$25 x 12 mos)	300.00
08/19/13	#2543	Sanesville Library	Audio Reader Rental (\$10 x 12 mos)	120.00
09/20/13	#2559	Walmart	Jeans, shirts, under wear	124.00
10/10/13	#2561	Sanesville Bowl	Senior Bowling; Senior Olympics - Yrly Fee	150.00
11/28/13	#2584	Sears	Winter Jacket; Christmas gifts	220.00
12/12/13	#2598	Orville Furniture	Lift Chair for Samuel Crown	1,200.00
02/24/14	#2677	Walmart	Clothing; personal care items; TV	456.78
04/28/14	#2792	Penney's	Towels, bath set, shower curtain; (Dresser \$400)	687.92
05/24/14	#2812	County Treasurer	Yearly Property Taxes	725.67
06/17/14	#2822	Walmart	Hygiene items; household cleaners	85.00
06/18/14	#2823	Sears & Applebees	Birthday Gift and Dinner for Samuel Crown	50.00
06/18/14	#2824	Dr. Long Tooth	Dentist - cleaning and two fillings	298.00

06/22/14	#2825	Eye Magic	New Glasses	220.00
06/22/14	#2826	Savers Union Bank	Ordered Checks	36.25
06/22/14	#2827	Sanesville Times	Newspaper Subscription (\$11.95 x 12 mos)	143.30
06/24/14	#2828	US Post Office	Stamps for paying bills (\$7.80 x 4 books)	31.20
			TOTAL	\$ 20,956.08

Savings Account Transactions

DATE	PAID TO	PURPOSE	AMOUNT
07/01/13		Beginning Balance	\$8,245.95
08/30/13	Samuel Crown	Quarterly Interest	(+ 3.45)
12/31/13	Samuel Crown	Quarterly Interest	(+3.79)
03/31/14	Samuel Crown	Quarterly Interest	(+3.57)
05/28/14	Samuel Crown	Transfer to Checking Account	(-1,000.00)
06/30/14	Samuel Crown	Quarterly Interest	(+3.02)
		Ending Balance	\$7,259.78

SUMMARY

Total Receipts	\$ 21	,961.98
Total Disbursements	\$ 20),956.08
Cash Balance on Hand	\$ 1	,005,90

II. INVENTORY

REAL ESTATE

	Address and Description	Va	lue
1.	39 Solar Haven Rd., Lot 59, Solar Haven Addition, Sanesville, KS 66666 (joint tenancy with Betty Crown)	\$	45,489.00
	Total Real Estate	\$	45,489.00

PERSONAL PROPERTY

Cash / Checking and Savings Accounts / Certificates of Deposit

	Description	Α	mount
1. 2. 3.	Checking Account, Savers Union Bank, Sanesville, KS Savings Account, Savers Union Bank, Sanesville, KS CD, Savers Union Bank	\$	1,005.90 7,259.78 2,350.00
St	ocks / Bonds / Investments / Retirement Accounts / Annuities		
	Description	Va	alue
1.	N/A	\$	0
Ve	hicles / RVs / Boats / Trailers		
	Description	Vá	alue
1.	2006 Toyota Camry	\$	5,700.00
Fu	rniture / Household Goods / Wearing Apparel / Jewelry		
	Description	Va	alue
 2. 	Household furnishings Lift Chair (\$1200) Dresser (\$400) Wearing Apparel		4,500.00 1,600.00 500.00
Oth	ner Assets Description	Vs	alue
1. 2. 3. 4.	Red Shield life insurance (cash value) Funeral & burial trust, Timberline Mortuary, Sanesville, KS Antique gun collection Lawn mower and tools	\$ \$ \$ \$	10,000.00 4,250.00 1,500.00 300.00
	Total Personal Property	\$	38,060.68
	Total Real Estate and Personal Property	\$	83,549.68

DEBTS AND LIABILITIES

Mortgages / Liens / Loans / Credit Card Debt

Description	Amount	
 Mortgage on 39 Solar Haven Rd. Bank of America Visa credit card 	\$ 17,000.00 1,000.00	
Total Debts and Liabilities	\$ <u>18,000.00</u>	
RECAPITULATION		
Total Real Estate and Personal PropertyLess Total Debts and Liabilities	\$ 83,549.68 \$ (18,000.00)	
Total Estate	\$ <u>65,549.68</u>	
I declare under penalty of perjury under the laws of the state of Kansas that the foregoing is true and correct. Executed on June 30, 2014.		
Conservator		

IN THE 32nd JUDICIAL DISTRICT DISTRICT COURT OF APACHE COUNTY, KANSAS

In the Matter of the)		
Guardianship and Conservatorship)		
of Samuel G. Crown)		
)	Case No	
)	-	_
Proceeding Pursuant to K.S.A. Chapt	ter 59		

X ANNUAL _ FINAL REPORT ON THE CONDITION OF THE GUARDIAN'S WARD

From July 01, 2013 to June 30, 2014

Smithville Road, Apartment #4
S
999-71000 mcrestone@gmail.com
one Number Email Address
)

guardian in the above-entitled estate submits the following annual report on the condition of Samuel G. Crown
Name

1942
Year of Birth

- 1. The ward resided at the following places during the reporting period:

 39 Solar Haven Rd, Sanesville, KS 66666
 (address)

 Own home
 (type of residence) (length of stay)
- 2. State the approximate number of times the guardian has contact with the ward, the nature of such contacts, and the date the ward was last seen by the guardian:

Guardian visits ward in his own home approximately two to three times per month. Guardian checks on the ward's health status, sufficient groceries, household and personal care items, and the home cleanliness, maintenance and upkeep.

- 3. Summarize the medical, social, educational, vocational and other professional services received by the ward during the reporting period:
- Samuel is retired. He is recuperating from recent hip surgery and receives bi-weekly physical therapy; he takes medications for diabetes, high blood pressure, heart disease and pain associated with osteoporosis. He has monthly doctor appointments to monitor medications. Additionally, a home health nurse visits weekly to set up his medications. Samuel reads, watches TV and enjoys activities at the senior center and periodic visits from his great-niece who lives out of state.
- 4. If the ward is institutionalized, the results of an investigation into the nature and

appropriateness of the ward's care and treatment are as follows:

Ward lives in his own home. Following hip surgery in August 2013, he recuperated for three weeks in a local nursing home after which he was able to return home.

5. What changes in the mental or physical condition of the ward has the guardian observed?

During the past year, Samuel experienced several episodes of memory lapses for which he is now receiving medication. The doctor indicates Samuel is in early stages of Alzheimer's disease. He had hip replacement surgery in August 2013 and now is able to walk using a cane. Other medical conditions are stable.

6. What major problems relating to the guardianship, if any, have arisen during the reporting period?

A former neighbor who had exploited Samuel attempted to reintroduce himself into Samuel's life. Guardian secured a restraining order against the person. No other problems were experienced.

- 7. In the opinion of the guardian, does the guardianship need to continue, and is it necessary to increase or decrease the powers of the guardian?

 The guardian has advocated and provided consents regarding health care, home maintenance and freedom from exploitation. Guardianship should continue with the current powers.
- 8. State compensation requested and expenses incurred by the guardian: Refer to itemized list attached.
- 9. What circumstances, if any, have arisen during the reporting period that could constitute a conflict of interest between the guardian and ward? None.
- 10. Other information required by the court is:

I declare under penalty of perjury under the laws of the state of Kansas that the foregoing is true and correct. Executed on June 30, 2014.

Guardian	

IN THE J DISTRICT COURT OF	UDICIAL DISTRICTCOUNTY, KANSAS
In the Matter of the (Guardianship)/(Conservatorship) of	Case No
Proceeding Pursuant to K.S.A. Chapter 59	Υ
AFFIDAVIT OF OF BASIC INSTRUC	
I declare that I have received and revand Conservators and kept a copy of the guardian and/or conservator, I have the dinstructions.	
I declare under penalty of perjury that	this is true and correct.
Executed on thisday of	
	Signature
	Please Print Your Name
	<u> </u>
	Address
	Telephone Number
	Email Address



Advocating

Empowering



Partnership

Sharing

Protecting

"Everyone deserves the right to have their needs and wishes honored."

"Someone without family needs an advocate."
"I enjoy giving back to my community."

The KGP recruits volunteers to serve as court appointed guardians or conservators

"Someone needs what you have to offer"

Every year many adult Kansans experience diminished capacity and become unable to make informed decisions regarding their lives and finances.

For those who do not have willing and able family members to assist them, fellow citizens can be court appointed as a guardian or conservator.

KGP

The Kansas Guardianship Program is recruiting, screening, and training interested persons to be court appointed guardians and conservators.

Individuals served through KGP are over 18 years of age, may have a disability, can be a senior without family involvement and unable to conduct their affairs.

They need your help.

Volunteer characteristics:

- Compassion
- Wisdom
- Dependability
- Desire to serve as a personal advocate



What volunteering with KGP can mean for you

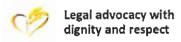
- Be an instrument of change in another life
- Experience the satisfaction of having helped another person
- Provide a valuable service to another in your community
- Walk with another person on the road of their life

KGP Offers:

Opportunities to blend personal interests and abilities with those to be served Support from regional staff Networking and information Ongoing Assistance Training and reference materials

Volunteers:

- Advocate for a higher quality of life for another, while Monitoring and protecting individual rights
- Develop a nurturing relationship with the person and visit on a regular basis
- Make legal decisions
- Participate in the planning of supports and services





"Those who are not

looking for happiness are the most likely to find it, because those who are searching forget that the surest way to be happy is to seek happiness for others."

Martin Luther King, Jr.

VOLUNTEER ADVOCATE BE IN SERVICE TO OTHERS

Main Office

3248 Kimball Avenue Manhattan, KS 66503-0353 (785) 587-8555 1-800-672-0086 (Kansas only)

www.ksgprog.org

Kansas City Office

601 N Mur-Len Road, Suite 10B Olathe, KS 66062 (913) 780-3300 Fax (785) 587-89626

Wichita Office

505 S. Broadway, Suite 207 Wichita KS 67202 (316) 269-2525

The Kansas Guardianship Program was initiated in 1979 under the administration of Kansas Advocacy and Protective Services, Inc. The 1995 Kansas Legislature established the program as a separate public instrumentality pursuant to K.S.A. 74-9601 et seq., as amended. The KGP is governed by a seven-member board of directors, six of whom are appointed by the Governor and one by the Chief Justice. Funds are provided by the State of Kansas.