

ACCOUNTING CHECKLIST

Guardianship of _____
Case No.: _____
Date of Review: _____
Attorney: _____
Person Reviewing: _____

Statutory requirements: Florida Statutes ' ' 744.3678 & 744.3679 (744.368-clerk responsibilities)

- 1. _____ There are no comments from the clerk on the blue review sheet
- 2. _____ The funds are in a restricted account (petition designating depository, order designating depository, and receipt from depository) or Bond has been issued.
- 3. _____ There were no disbursements

OR

_____ There were disbursements, but they were for attorney or guardian fees only.

Dates and amounts of disbursements: _____
_____ AND

_____ The disbursements are supported by court orders

OR

_____ There were a few disbursements for items other than attorney or guardian fees.

Dates, amount, and purposes of disbursements: _____
_____ AND

_____ The disbursements are supported by court orders

- 4. _____ The accounting is signed by the _____ attorney AND _____ all guardians of the property
- 5. _____ Must be served on ward, unless ward is a minor or totally incapacitated. (744.367)

COMMENTS:

_____ There were numerous non-attorney or guardian fee disbursements and further review is needed.

_____ There has been a marked decrease in the guardianship assets:
Total value of assets last accounting: _____
Total value of assets this accounting: _____

_____ Other: _____