

Guide to Guardianship Reporting Forms Summary of Guardian Responsibilities

Initially you must:

- Review the Guardianship Forms materials (written guide* and video).
- If you are required to report, determine what report(s) must be filed and when the report(s) must be filed.
- Note that you may be directed to file using Judiciary forms, including the Guardianship Inventory, Report of Well-Being, EZ Accounting, or Comprehensive Accounting, or by filing other documents, such as a copy of a Social Security Representative Payee Report or a formal accounting. (At the current time, these forms are currently available in English only.)

To fulfill your duties as guardian, you must:

- If ordered to file Judiciary reports, access these at: njcourts.gov (search for Guardian Reporting Forms).
- Always file a Report of Guardian Cover Page.
- Keep as close as possible to the reporting period set by the court's written Judgment.
- When filing the Report of Well-Being, attach a written statement of a professional who has examined the incapacitated person during the reporting period.
- File the type of financial report indicated in the Judgment.
 - If the Judgment of Incapacity does not specify which report to file regarding the estate, file the EZ Accounting Form.
- Contact the Surrogate's Office with any questions about completing or filing the reporting forms.

*At this time the written guide is available in English only