

Report Due Dates

Per FS 744.367						
Month Letters of Guardianship were issued:	Annual Reporting period (fiscal year) begins:	Annual Reporting period (fiscal year) ends:	Annual Accounting due no later than:	Exam by Physician must be NO EARLIER than:	Annual Plan due NO EARLIER than:	Annual Plan Due no later than:
January	Feb. 1	Jan. 31	May 1	Nov. 1	Nov. 1	Dec. 1
February	Mar. 1	Feb. 28 (29)	June 1	Dec. 1	Dec. 1	Jan. 1
March	Apr. 1	Mar. 31	July 1	Jan. 1	Jan. 1	Feb. 1
April	May 1	Apr. 30	Aug. 1	Feb. 1	Feb. 1	Mar. 1
May	June 1	May 31	Sep. 1	Mar. 1	Mar. 1	Apr. 1
June	July 1	June 30	Oct. 1	Apr. 1	Apr. 1	May 1
July	Aug. 1	July 31	Nov. 1	May 1	May 1	June 1
August	Sep. 1	Aug. 31	Dec. 1	June 1	June 1	July 1
September	Oct. 1	Sep. 30	Jan. 1	July 1	July 1	Aug. 1
October	Nov. 1	Oct. 31	Feb. 1	Aug. 1	Aug. 1	Sep. 1
November	Dec. 1	Nov. 30	Mar. 1	Sep. 1	Sep. 1	Oct. 1
December	Jan. 1	Dec. 31	Apr. 1	Oct. 1	Oct. 1	Nov. 1

Initial Reports (inventory, plan, and disaster plan) are due no later than 60 days from the date Letters of Guardianship were issued, per FS 744.362. The physician's exam should be no more than 90 days before the start of the plan period. For minors, the physician's exam must be no more than 180 days before the reporting period.

Updated disaster plans are required when a new guardian is appointed or the ward's residence is changed. They are to be filed when the initial or annual plan is due, per [Administrative Order 2009-036](#).

For the Sixth Circuit, the clerk is directed to send out a Guardianship Filing Schedule with due dates when Letters of Guardianship are issued, per Administrative Order 2009-036.