

# Sixth Circuit Guardianships

## SIMPLIFIED ANNUAL ACCOUNTING

Case Number

0

The purpose of this accounting is to report the assets on hand at the beginning of the accounting period, all transactions that have occurred during the period covered by the accounting and the assets that remain on hand at the end of the accounting period.



IN THE CIRCUIT COURT, SIXTH JUDICIAL CIRCUIT, FLORIDA

For Official Use Only:

### SIMPLIFIED ANNUAL ACCOUNTING

Name of Ward:

*[entering the Ward's Name here will auto-populate this document]*

GID:  
*[see below]*

Case Number: *[entering the Case Number here will auto-populate this document]*

Amended Form? *[Place 'Yes' in this box.]*

#### INSTRUCTIONS

This *Simplified Annual Accounting* report with ORIGINAL Signatures is DUE on the FIRST Day of the FOURTH Month after the Ward's Fiscal Yearend

The *Guardianship Inception Date* ("GID") is the date the *Letters of Guardianship* were signed.

THIS SIMPLIFIED ANNUAL ACCOUNTING, as provided for within Florida Statute 744.3679, is appropriately used when, and only when, all assets of the guardianship are in designated depositories under F.S. 69.031 and the only transactions that occur in that account are interest income, deposits pursuant to settlement, financial institution service charges and payment of federal income tax.

Copies of the FISCAL year-end statement(s) of all the Ward's cash accounts from each of the designated depositories where cash is deposited must be attached.

Enter all amounts in this document in numbers, e.g., 2500.50 or -2500.50. Each entry will be automatically converted into dollars and cents: \$2,500.50 or (\$2,500.50).

*Remaining Assets On Hand* should agree with the fiscal yearend statements.

#### Part I REQUIRED INFORMATION

IN RE: GUARDIANSHIP OF	0		
Social Security Number			
For the Period	From		To
Case Number	0		
Attorney for Guardian			
Guardian			
Type of Guardianship			

#### Part II ACCOUNTING SUMMARY and REMAINING ASSETS ON HAND

Line 1	Starting Balance <i>[Net Assets per the Prior Report]</i>		
Income <i>(Only the following receipts qualify)</i>			
Line 2	Interest Income		
Line 3	Deposits pursuant to Settlement		
Line 4	<i>Total Income</i>		\$0.00
Less Disbursements <i>(Only the following receipts qualify)</i>			
Line 5	Financial Institution Service Charges		
Line 6	Federal Income Tax		
Line 7	<i>Total Disbursements</i>		\$0.00
Assets On Hand			
Line 8	<i>Remaining Assets On Hand</i>		\$0.00

*(continued)*



IN THE CIRCUIT COURT, SIXTH JUDICIAL CIRCUIT, FLORIDA

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## SIMPLIFIED ANNUAL ACCOUNTING

### Part III

Under penalties of perjury, I declare that I have read and examined the foregoing return and that, to the best of my knowledge and belief, it constitutes a full and correct account of all the ward's property of which this guardian has control, and is a complete report of all cash and property transactions and of all receipts and disbursements by me from .....

	<i>(insert date)</i>		<i>(insert date)</i>
from.....	01/00/00	through.....	01/00/00


### Part IV

\*\*\* All guardians of the property must sign and provide the most current address, telephone number, and social security number.\*\*\*

\*\*\* Only reports with Original Signatures will be audited by the Clerk of the Court.\*\*\*

<i>Guardian #1's Signature</i>	<i>Date</i>	<i>Guardian #1's Name</i>
		0
<i>Guardian #1's SSN / EIN</i>		<i>Guardian #1's Street Address</i>
<i>Guardian #1's Phone Number</i>		<i>Guardian #1's City / State / Zip Code</i>
<i>Co-Guardian #2's Signature</i>	<i>Date</i>	<i>Co-Guardian #2's Name</i>
<i>Co-Guardian #2's SSN / EIN</i>		<i>Co-Guardian #2's Street Address</i>
<i>Co-Guardian #2's Phone Number</i>		<i>Co-Guardian #2's City / State / Zip Code</i>
<i>Co-Guardian #3's Signature</i>	<i>Date</i>	<i>Co-Guardian #3's Name</i>
<i>Co-Guardian #3's SSN / EIN</i>		<i>Co-Guardian #3's Street Address</i>
<i>Co-Guardian #3's Phone Number</i>		<i>Co-Guardian #3's City / State / Zip Code</i>

*(continued)*

Name of Ward:	0	Summary	Page 3	Case Number:	0
	IN THE CIRCUIT COURT, SIXTH JUDICIAL CIRCUIT, FLORIDA				0
	SIMPLIFIED ANNUAL ACCOUNTING				

Part V SIGNATURE of GUARDIAN ATTORNEY					
<i>The attorney may use an electronic signature "/s/"</i>					
The undersigned Attorney hereby notifies the Court of the filing of the simplified annual accounting of the Guardian .....					
Ward's name		for the period.....			
0					
(insert date)		(insert date)			
from	01/00/00	through	01/00/00		
This simplified annual accounting is the representation of the guardian. I have not audited the accompanying guardianship accounting. The undersigned attorney represents that he/she has examined the contents of the accounting and that it conforms to the requirements of the Florida Guardianship Law and the standards for accountings in .....					
0		County, Florida.			
Attorney Signature		Date		Attorney's Name [linked to Part I]	
/s/				0	
Attorney's Bar Number				Attorney's Street Address	
Attorney's Phone Number				Attorney's City / State / Zip Code	

Part X GUARDIAN ATTORNEY					
Certificate of Service					
<i>The attorney may use an electronic signature "/s/"</i>					
Pursuant to the Florida Statute 744.362(1), I hereby certify that a copy of this simplified annual accounting has been furnished to:					
Name and Address of Recipient			Name and Address of Recipient		
.....			.....		
.....			.....		
.....			.....		
Name and Address of Recipient			Name and Address of Recipient		
.....			.....		
.....			.....		
.....			.....		
on this date.....		Date		Indicate if:	
Attorney Signature		Date		Attorney's Name [linked to Part I]	
/s/				0	
Attorney's Bar Number				Attorney's Street Address	
Attorney's Phone Number				Attorney's City / State / Zip Code	

(End of Simplified Annual Accounting)