

**INSTRUCTIONS TO GUARDIANS AND GUARDIAN ADVOCATES FOR FILING ANNUAL PLANS**

1. Fill in the name of the County where the case is filed on the second blank line at the top where it reads "IN AND FOR \_\_\_\_\_ COUNTY."
2. Print the name of the ward on the line just below the "In Re: Guardianship of" caption.
3. Put the case number in the space marked "CASE NO.:" in the upper right-hand corner (Same as court file number).
4. On the first blank line after the title of the document (Annual Plan), print the guardian's name.
5. On the next blank line, print the ward's name.
6. Write in the dates for the period of time of the plan. This period should end on the last day of the month of the month you were appointed and begin a full year before that. If you do not know your plan period, please see the chart below. Please call the Clerk's Office or the appropriate Court Staff in the county where you are filing, if you cannot determine the plan period after reviewing the chart.
7. Type or print answers to all of the questions on the plan. If the question does not apply to your ward's circumstances, write in the phrase "not applicable." Fill in all the blanks. If your ward has a habilitation plan (produced by the social worker or the Florida Department of Children and Families) and it has changed, please provide a copy of the habilitation as an attachment to the plan. If the habilitation plan has not changed then do not file a copy.
8. In paragraph 9, if your ward participates in groups, include that information in this paragraph.
9. Sign your name, and print your name, address, e-mail address, and phone number where indicated. If there are co-guardians or co-guardian advocates, both must sign the plan.
10. Make a copy of the plan for your records in the event there is a problem and work from it for next year's plan. Make a copy of any attachments to the plan, as well.
11. E-file, mail or hand-deliver the plan to the **Clerk of Court** of the county where the case is filed. You **MUST** also send a copy of the plan to your attorney, if you have an attorney, so that the attorney will know that you have filed the plan and will have a copy of the plan in case there is a problem.

**ANNUAL ACCOUNTING AND PLAN DATES (IF FISCAL YEAR REPORT PERIOD)**

<b>Month Letters</b>	<b>Report Begin</b>	<b>Report End</b>	<b>Report Due</b>
<b>Signed</b>	<b>Date</b>	<b>Date</b>	<b>Date</b>
January	February 1	January 31	May 1
February	March 1	February 28	June 1
March	April 1	March 31	July 1
April	May 1	April 30	August 1
May	June 1	May 31	September 1
June	July 1	June 30	October 1
July	August 1	July 31	November 1
August	September 1	August 31	December 1
September	October 1	September 30	January 1
October	November 1	October 31	February 1
November	December 1	November 30	March 1
December	January 1	December 31	April 1