

# ANNUAL REPORT OF GUARDIAN OF THE PERSON

COURT OF COMMON PLEAS OF  
BUCKS COUNTY, PENNSYLVANIA  
ORPHANS' COURT DIVISION

Estate of \_\_\_\_\_, an Incapacitated Person

No. \_\_\_\_\_

## I. INTRODUCTION

\_\_\_\_\_, was appointed  Plenary  Limited Guardian of the  
Estate by Decree of \_\_\_\_\_, J., dated \_\_\_\_\_.

A. This is the **Annual Report** for the period from \_\_\_\_\_, 20\_\_ to \_\_\_\_\_, 20\_\_  
(the "Report Period"); *or*

B. This is the **Final Report** for the period from \_\_\_\_\_, 20\_\_ to \_\_\_\_\_, 20\_\_ (the  
"Report Period"), and is filed for the following reason:

1. The death of the Incapacitated Person. Date of death: \_\_\_\_\_

Name of Personal Representative : \_\_\_\_\_

2. The Guardianship was terminated by the Court by Decree of \_\_\_\_\_  
\_\_\_\_\_, J., dated \_\_\_\_\_.

***For a Final Report, omit Sections II through IV.***

## II. PERSONAL DATA

Age of the Incapacitated Person: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

## III. LIVING ARRANGEMENTS

A. Current address of the Incapacitated Person: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

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B. The Incapacitated Person's residence is:

- own home / apartment
- nursing home
- boarding home / personal care home
- Guardian's home / apartment
- hospital or medical facility
- relative's home (name, relationship and address): \_\_\_\_\_  
\_\_\_\_\_
- other: \_\_\_\_\_  
\_\_\_\_\_

C. The Incapacitated Person has been in the present residence since \_\_\_\_\_. If the Incapacitated Person has moved within the past year, state prior residence and reason(s) for move: \_\_\_\_\_

D. Name and address of the Incapacitated Person's primary caregiver: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**IV. MEDICAL INFORMATION**

A. The major medical or mental problems of the Incapacitated Person are as follows: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

B. Specify what, if any, social, medical, psychological and support services the Incapacitated Person is receiving: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

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**V. GUARDIAN’S OPINION**

A. It is the opinion of the Guardian of the Person that the guardianship should:

- continue
- be modified
- be terminated

The reasons for the foregoing opinion are:

B. During the past year, the Guardian of the Person has visited the Incapacitated Person \_\_\_\_\_ times with the average visit lasting \_\_\_\_\_ hours, \_\_\_\_\_ minutes.

*The report of a social service organization employed by the Guardian to oversee and coordinate the care of the Incapacitated Person for the period covered by this Report may be attached to supplement this Report.*

I verify that the foregoing information is correct to the best of my knowledge, information and belief; and that this Verification is subject to the penalties of 18 Pa.C.S. § 4904 relative to unsworn falsification to authorities.

\_\_\_\_\_  
*Date*

\_\_\_\_\_  
*Signature of Guardian of the Person*

\_\_\_\_\_  
Name of Guardian of the Person (type or print)

\_\_\_\_\_  
*Address*

\_\_\_\_\_  
*City, State, Zip*

\_\_\_\_\_  
*Telephone*