



Items to Bring for Guardianship Administration

1. Non-Financial Documents

- Identification – picture ID (driver's license, state ID, if no picture ID, then something with proposed ward's name)
- Social Security card(s)
- Birth verification (birth certificate, baptismal certificate, or school record with date of birth)
- Marriage certificate or death certificate/divorce decree of spouse
- Health Insurance Identification Card (for all insurance coverage including Medicare, Medicare Supplement, HSA, etc.)
- Names, addresses, phone numbers and email addresses of spouse, all children, parents, and siblings
- Physician's names and contact information
- Recent medical records and reports
- Listing of assets sold or given away in the last five years

2. Legal Documents

- Most recent Will
- Trust documents
- Business entity/partnership agreements
- Prenuptial Agreements
- Gift tax returns

3. Non-Liquid Assets

- Deeds, land contracts, property agreements for all real estate
- Titles to all vehicles, motor crafts, jet skis and trailers
- Stock certificates
- Savings bonds
- Promissory notes or loans (owed to proposed ward)

4. Liquid Assets (for all current accounts)

- Bank and credit union statements (checking, savings, CDs, money market, etc.)
- IRA/401(k) account statements
- Brokerage account statements
- Checkbook register and savings passbooks

5. Insurance and Annuities

- All life insurance policies (including annual statements)
- Annuity contracts (annual/quarterly statements)
- Long-term care, cancer, and accidental death policies
- HSA statement

6. Income and Expenses

- Income tax returns and attachments for the last 2 years
- Prepaid funeral and cemetery contracts
- Home/car insurance statement
- Social Security, Pension, and other income information

7. Debt Information

- Mortgage statement
- Credit card statements
- Loan documents



To make the most efficient use of our time together it is very important that you upload your documents to your client portal in the corresponding folders. A link will be provided to you by email 3 - 4 days prior to your scheduled appointment. If you need to bring us hard copies, please make sure they are copies and not originals, of the above documentation and separate these items into seven (7) folders and bring to our office.