

SUPREME COURT
COUNTY OF QUEENS

IN THE MATTER OF
THE INITIAL REPORT OF

Index No.
Initial Report

AS GUARDIAN FOR

AN INCAPACITATED PERSON.

I _____ residing at
_____, as Guardian for the
above named person, do hereby make, render and file the following
Initial Report of Guardian as follows:

1. That your Guardian has successfully completed all
educational requirements under section 81.39 of the Mental Hygiene
Law by attending class on the _____ day of _____,
20____, sponsored by _____ at
_____. (Attach a copy of certificate issued
to Guardian.)

2. That your Guardian has visited the ward and has taken the
following steps, consistent with the Court Order and has provided
for her personal needs as follows:

A. Provisions for medical, dental, mental health or related
services:

B. Provisions for social and personal services:

C. Application of health and accident insurance as well as government benefits:

D. Date, time and place of visits made with the incapacitated person since the order of appointment:

3. The following is a true and full account of all assets of the incapacitated that has been marshalled by your Guardian:

BANK ACCOUNTS:

(List name and address of institution, account numbers and amount of money on hand prior to liquidation by Guardian)

STOCKS AND SECURITIES:

(List name and address of company, number of shares and fair market value of stock or security as of the date of your appointment)

REAL ESTATE:

(List property address, description of property [i.e. two-family dwelling] and approximate value of premises, and names of tenants, if any, as well as rental income collected. Set forth date of filing of Statement Identifying real property with County Clerk.)

PERSONAL PROPERTY

Set forth any jewelry, collectibles, automobiles and cash and set forth approximate value.

INCOME

Set forth and identify all sources of income the incapacitated person is entitled to receive.

