

Rule 328. Guardianship reports.

(a) Filing.

A limited or general guardian shall submit a written report to the Court at least semi-annually on the condition of the ward and the ward's estate that has been subject to the guardian's possession or control. The first report shall be due six months from the date of appointment of the guardian with each succeeding report due at six month intervals thereafter. The guardian shall also submit a report upon order of the Court on petition of any person interested in the ward's welfare and at such times as the Court may direct. Within 60 days of the termination of the guardianship, the guardian shall file a final report if assets were administered. If no assets were administered by the guardian, an affidavit in lieu of final report shall be filed. Guardianship reports shall be prepared on Form II-M and signed under oath.

(b) Service.

Guardianship reports shall be served upon all parties; upon any person who has filed an effective request for notice as provided in SCR-PD 304, and upon such other persons as the Court may direct.

The reports shall be served by first class mail within five days before or after the filing of the report. Proof of service shall be by certificate of service.

(c) Exceptions or objections to guardianship report; petition to modify.

Any exceptions, objections, or petitions to modify a guardianship report shall be filed pursuant to SCR-PD 322. In the event no response to the report is filed by any interested person the report will be placed in the file without Court review or other action.

(d) Suggestion of death.

Upon the death of an individual for whom a guardian is appointed, the guardian shall file a suggestion of death forthwith, and shall file report when required by subsection (a) of this rule.