

LEXISNEXIS® NEW YORK STATE BAR ASSOCIATION'S AUTOMATED GUARDIANSHIP FORMS

NYSBA's Guardianship Forms (Mental Hygiene Law Article 81)

LexisNexis Automated Forms Updates
LexisNexis Automated Forms Feedback
LexisOne Forms
Foreword

Intakes

Attorney Intake
Court Examiner Intake
Guardianship Court Clerk Intake
Judge/Justice Intake
Medicaid Attorney Intake
MHL Attorney Intake

New York State Office of Court Administration Forms

Statement of Approval of Compensation (UCS-830) (Letter)
Statement of Approval of Compensation (UCS-830) (Legal)
Request for Judicial Intervention (RJI) for Guardianship Petition (UCS-840)

Forms Recommended by the NYS Office of Guardianship Services

Findings of Fact, Conclusions of Law and Judgment
Letter From Office of Guardianship Services to Guardian
Designation
Commission to Guardian
Statement Identifying Real Property

Initial Interview Form and Checklists

Initial Interview with Client
Checklist for Court Evaluator
Checklist for Annual Report and Accounting

Petition for Guardianship

Request for Judicial Intervention (RJI) for Guardianship Petition (UCS-840)
Nomination of a Guardian [Release 2]
Petition for Guardianship
Petition for Guardianship (Nassau County format)

Order to Show Cause for Appointment of a Guardian
Order to Show Cause for Appointment of a Guardian (Nassau County format)
Back for Order to Show Cause & Petition
Proof of Service of Order to Show Cause and Petition
Physician's Affidavit
Temporary Restraining Order
Notice of Pendency for Real Property
Notice of Appearance of Counsel
Demand for Bill of Particulars
Demand for Jury Trial
Objections to Guardianship and Cross Petition
Stipulation to Adjourn

Court Evaluator Forms

Consent to Appointment & Qualifying Affidavit by Court Evaluator
Back for Court Evaluator Consent to Appointment & Qualifying Affidavit
Affidavit for Bank to Obtain Account Information
Subpoena for Bank Records
Affidavit to Obtain Medical Records by Court Evaluator [Release 2]
Order to Show Cause for Court Evaluator to Obtain Medical Records [Release 2]
Order Granting Court Evaluator Access to Medical Records [Release 2]
Report to Court by Evaluator
Back for Court Evaluator's Report to Court
Affirmation/Affidavit of Services by Court Evaluator
Back for Affirmation/Affidavit of Service
Proof of Service of Affirmation/Affidavit of Services

Appointment of Guardian

Order & Judgment Appointing Guardian
Order & Judgment Appointing Guardian (Nassau County format)
Back for Order & Judgment Appointing Guardian
Supplemental Needs Trust
Notice of Settlement for Order & Judgment; Notice of Entry for Order & Judgment
Back for Notice of Settlement/Entry of Order Appointing Guardian
Affirmation/Affidavit of Settling Order & Judgment to Appoint Guardian
Waiver of Notice of Settlement for Order & Judgment by an Attorney in the Proceeding
Waiver of Notice of Settlement for Order & Judgment Appointing Guardian by an Interested Party
Affirmation of Services by Attorney for Petitioner
Back for Affirmation of Services by Attorney for Petitioner

Mailing of Affirmation of Services by Attorney for Petitioner
Affirmation of Services as Attorney for AIP, with Mailing Proof
Affirmation of Services as Attorney for Interested Party, with Mailing Proof
Consent to Appointment as Guardian & Qualifying Affidavit
Back for Consent to Appointment as Guardian & Qualifying Affidavit
Consent to Act (Nassau County format)
Back for Consent to Act (Nassau County format)
Designation of Clerk to Receive Process
Back for Designation of Clerk to Receive Process
Cover Sheet for Guardian's Bond
Back for Guardian's Bond
Commission to Guardian(s)
Commission to Guardian(s) (Nassau County format)
Back for Commission to Guardian(s)
Letter to Examiner with Commission
Statement Identifying Real Property
Short Form Application/Order
Order Permitting Guardian to Resign

Court Forms for Sale of Property (by Guardian)

Petition for Approval for Sale of Real Property
Order to Show Cause for Approval of Sale of Real Property
Back for Order to Show Cause for Approval to Sell Real Property
Affidavits/Affirmations for Mailing of Order to Show Cause for Approval of Real Property Sale
Order & Judgment Approving Sale of Real Property
Notice of Settlement of Order & Judgment Approving Sale of Real Property
Back for Order Approving Sale of Real Property
Affidavit Supporting Confirmation of Sale of Real Property
Notice of Motion for Order Confirming Sale of Real Property
Order and Judgment Confirming Sale of Real Property and Directing Use of Proceeds
Notice of Entry of Order Confirming Sale of Real Property

Contract and Closing Documents for Sale of Property

Contract for Guardian's Sale of Real Property
Rider to Contract of Sale
Bargain and Sale Deed with Covenant Against Grantor's Acts (NYBTU Form 8002)
Closing Statement for Sale of Real Property [Release 2]
NYC Affidavit of Compliance with Smoke Detector Requirement for One- and Two-Family Dwellings

NYC Affidavit in Lieu of Registration Statement

Institutional Commitment Forms

Commitment to Long-Term Care: Affidavit in Support of Motion

Commitment to Long-Term Care: Notice of Motion

Commitment to Long-Term Care: Order Approving

Initial Reports and Accounts

Initial Account Schedule A - Assets on Hand

Initial Account Schedule B - Marshaled Funds and Increases

Initial Account Schedule C - Income

Initial Account Schedule D - Disbursements

Initial Account Schedule E - Items on Hand

Initial Account Schedule F - Bond

Summary Figures for Initial Report (use after schedules have balanced)

Initial Accounting by Guardian (use after Summary has balanced)

Initial Report by Guardian

Back for Initial Report by Guardian

Annual Reports and Accounts

Annual Account Schedule A - Principal on Hand at Last Accounting

Annual Account Schedule B - Increases to Principal

Annual Account Schedule C - Received Income

Annual Account Schedule D - Paid Disbursement

Annual Account Schedules E-1, E-2, E-3 - Balances on Hand, Real Property and Personal Property

Annual Account Schedule F - Surety Information

Summary Figures for Annual Report (use after schedules are completed)

Medical Report

Annual Account of Guardian (use after summary has balanced)

Annual Report of Guardian (or Committee or Conservator)

Back for Annual Account of Guardian

Back for Annual Report of Guardian

Annual Account Affirmation of Legal Services

Back for Annual Account Affirmation of Legal Services

Cover Letter to Examiner for Reports

Final Reports and Accounts

Final Account Schedule A - Principal on Hand at Start

Final Account Schedule B - Increases in Principal

Final Account Schedule C - Income Received
Final Account Schedule D - Disbursements
Final Account Schedule E - Assets on Hand
Final Account Schedule F - Surety Report
Summary Figures for Final Account (use after schedules are completed)
Final Account (use after Summary has balanced)
Back for Final Account
Petition for Ex Parte Order Permitting Final Account
Back for Ex Parte Order and Petition
Ex Parte Order Permitting Final Accounting
Petition for Order Settling Final Account
Notice of Motion for Order Settling Final Account
Back for Petition and Notice of Motion
Order Settling Final Account
Back for Order Settling Final Account
Mailing Affirmation/Affidavit for Final Account Papers
Affirmation of Legal Services to Accompany Order Settling Final Account
Back for Affirmation of Legal Services (with Mailing Proof)
Notice of Entry of Order Settling Final Account
Back for Notice of Entry of Order Settling Final Account
Affirmation of Compliance

Guardian ad Litem

Affirmation of Services as Guardian ad Litem for a Final Account
Consent and Qualifying Affidavit for Guardian ad Litem Appointment

IRS Forms

Application for Employer Identification Number (SS-4)
Request for Taxpayer Identification Number and Certification (W-9)
Instructions for the Requester of Form W-9 Request for Taxpayer Identification Num.
and Cert.
Notice Concerning Fiduciary Relationship (56)
Power of Attorney and Declaration of Representative (2848)
Instructions for Form 2848 Power of Attorney and Declaration of Representative
Request for Copy or Transcript of Tax Return (4506)