STAT	TE OF INDIANA) IN THE SUPERIOR COURT 2
COU	NTY OF JOHNSON) CAUSE NO: 41D02
IN RI	E THE GUARDIANSHIP OF:
PRO7	TECTED PERSON/ADULT
PETI	TION FOR APPOINTMENT OF PERMANENT GUARDIAN FOR INCAPACITATED PERSON
	your name), Petitioner, says:
1.	(ward), date of birth, who is currently residing
	at Johnson County, IN, is an incapacitated person and is subject to the jurisdiction of the Court by
	virtue of being a resident of Johnson County, IN.
2.	The alleged incapacitated person's presence at any hearing on this Petition is not required because:
3.	The incapacitated person is an individual who is unable to:
	a. manage his/he property;
	b. provide self-case,
	because of insanity, mental illness, mental deficiency, physical illness, infirmity, habitual
	drunkenness, excessive use of drugs, incarceration, confinement, dentition, duress, fraud,
	undue influence of others on the individual, or other capacity.
4.	The property of the incapacitated person is of the approximate value of \$
5.	There is no Guardian of the Person or Estate of the incapacitated person in any state.
6.	The person or institution to be appointed Guardian is:
	Name:
	Address:
	(City, State, Zip)
	Phone Number: (include area code)
7	Relationship:
7.	
	Name:
	Address: (City, State, Zip)
	Phone Number: (include area code)
	Relationship:

8.	The person or Institution (Caregiver) having the care and custody of the incapacitated person is:
	Name:
	Address:
	(City, State, Zip)
	Phone Number: (include area code)
	Relationship:
9.	The person to be appointed Guardian, if not a corporation, is already the Guardian of the following
pro	tected person(s):
10	The reason for appointment of a Guardian is to provide care and supervision of the person or
pro	perty of the incapacitated person, and the interest of the petitioner is such appointment is:
PT	perty of the meapuration person, and the interest of the perturbion is such appointment is
-	·
	Signature
	Date
	2.00

STATE OF INDIANA)	IN THE SUPERIOR COURT 2
COUNTY OF JOHNSON)	CAUSE NO: 41D02
IN RE THE GUARDIANS	HIP OF:	
PROTECTED PERSON/AI	DULT	_
	OATH AND A	ACCEPTANCE OF GUARDIAN
1. I accept appointmen	t as guardian of	the
PERSON		
ESTATE		
PERSON A	ND ESTATE	
ForIncapacitated	d person's name	
2. I will faithfully disc.	harge the duties	of my trust as such Guardian.
I affirm unde	er the penalties f	for perjury that the foregoing representations are true.
		Printed Name
		Signature
		 Date

STATE OF INDIANA)	IN THE SUPERIOR	COURT 2
COUNTY OF JOHNSON)	CAUSE NO: 41D02	
IN RE THE GUARDIANSHIP	OF:	
PROTECTED PERSON/ADUL	T	
CONSENT TO THE APPO	INTMENT OF A GUARDIAN BY A RE	ELATIVE OR INDIVIDUAL
I,	(Your Name), being duly sworn u	pon his or her oath, says that
he/she is an adult and is familiar	with the Petition of	(Petitioner's Name
for the appointment of a guardia	n over the incapacitated person	(You
	intment of	
hereby expressly waives service	of summons and notice of hearing on sai	d guardianship petition.
	Printed Name	2
	Signature	
Sworn to me and subscribed in r	ny presence, a Notary Public in and for th	ne State of
, County of	, this day of	, 20
		
	<u> </u>	
	Signature	
	Expiration Da	ate of Notary

STATE OF IND	IANA)	IN THE SUPE	RIOR COURT 2	
COUNTY OF J	OHNSON) SS:)	CAUSE NO: 4	1D02	
Plaintiff / Petiti					
	oner,				
V.					
Defendant / Res	pondent.				
	F				
			APPEARANCI	<u>E</u>	
1. My name	e is:				
2. I am the Γ 1 Initian	ting (filing) P	artv []]	Responding (defen	ding) Party	[] Intervening Party
			ted by a lawyer.	<i>6) j</i>	-1 0 /
3. This case	is a: []	Small Clai	m [] Dissol	ution []	Other:
4. Are there	any other cas	ses involving	g the same children	n or adults? []	Yes [] No
Signature					
Printe	d Name:				
Addre	-				
City*	·:			State*	ZIP*:
Phone	,*·				
Email	*.				
Lindii	•				

 $[\]star$ = It is your responsibility to notify the Court immediately if this information changes.

JOHNSON COUNTY PROBATE FORM NO. 1

APPLICATION FOR APPOINTMENT OF PERSONAL REPRESENTATIVE (COMPLETE ONE FORM FOR EACH PERSONAL REPRESENTATIVE)

CONTACT INFORMATION	<u> </u>
Case No.:	41
Name:	
Address:	
Length of Residence:	
Phone number:	(
BACKGROUND / EXPERIE	NCE:
Highest degree receiv	ed (including institution and year degree received):
Employer:	
Address:	
Length of employmen	
Past experience with	financial management (including investing and checkbook management):
Territory of the Unite	ed States? Yes No
AFFIRMATIONS AND VER	IFICATION:
	HE PENALTIES OF PERJURY THAT THE FOREGOING INFORMATION IS TRUE
	IRM THAT I HAVE ATTAINED THE AGE OF MAJORITY. I AM NOT
	REASON OTHER THAN PHYSICAL MATTERS.
	M THAT I HAVE PROVIDED MY ATTORNEY MY DATE OF BIRTH AND SOCIAL
SECURITY NUMBER.	AE ADDOINTMENT OF THE DEDCONAL DEDDESENTATIVE LUEDEDV WAIVE
	OF APPOINTMENT OF THE PERSONAL REPRESENTATIVE, I HEREBY WAIVE ATED WITH THIS INFORMATION AND AUTHORIZE MY ATTORNEY TO
	ATED WITH THIS INFORMATION AND AUTHORIZE MY ATTORNET TO ATION TO THE COURT, UPON COURT ORDER IN THE EVENT OF MY FAILURE
	TT AS REQUIRED BY LAW OR OTHER DETERMINATION OF BREACH OF
FIDUCIARY DUTY.	TAS REQUIRED BY EAVY OR OTHER DETERMINATION OF BREACH OF
Dated: / /	
	Signature
☐ Proposed Order of Appointm	ent and Letters enclosed.

STATE OF INDIANA)	IN THE SU SS:	UPERIOR COURT 2
COUNTY OF JOHNSON)		O: 41D02
IN RE: THE GUARDIANSHIP	OF:	
	ORDER ON FEE WAIVE	<u>ER</u>
The Petitioner's Motion	for Fee Waiver is:	
GRANTED,		
It is therefore ORDERI	ED that the Petitioner may file	this case:
witho other expenses;		ng fees, costs, security, bond or
set by statute. S twenty (20) days	uch sum must be paid by the P	which is a portion of the filing fee Petition to the Clerk within the next hether any or additional costs are to scase.
OR		
DENIED		
SIGNED THIS	DAY OF	, 20
	PETER NUGENT, JUDO JOHNSON SUPERIOR (
Distribution:		
Petitioner(s)		
Mailing address		
Town, State and Zip Code		
Telephone number		
Email		

STA	TE OF INDIANA))SS:	IN THE SUPERIOR COUR	Γ2
COL	JNTY OF JOHNSON)	CAUSE NO: 41D02	
IN R	RE: THE GUARDIANS	HIP OF:		
	V	ERIFIED M	— 10TION FOR FEE WAIVER	
Petit	tioner,		now states:	
1.	I have filed a court a and I believe that I h	_	t someone or someone has filed a vith merit.	court action against me
2.	1 2	_	s, costs, security, bond or other exincome or resources.	penses of this action
3.	I live with			
4.	Our family's income	e is \$	per month (total from lir	ne #31 below).
	Unemployme AFDC/TAN SSI/SSD Ber Child Suppo	per ho ent Compens F Benefits nefits rt	ur x hours per month)	
5.	We have \$	_ in the ban	k.	
6.	Our expenses total \$	·	per month: (total from line #4	7 below)
	Utilities (Gas Food Child Care Medical Bills Transportation	nt, Contract, s, Electric, Wes son ar, medical art	or Mortgage) Vater, Phone, Etc.) nd/or property) Total=	

I request that this Court waive all costs of this action and allow me to proceed without the payment of any filing fees or other costs.

I affirm under penalties of perjury that the foregoing representations are true.

Signature	
Print your name	
Mailing address	
Town, State and Zip Code	

STATE OF INDIANA)) SS:	IN THE SUPERIOR COURT 2	
COUNTY OF JOHNSON)	CAUSE NO: 41D02	
IN THE MATTER OF THE GUARDIANSHIP OF)))		
1. General Information	PHYSIC	CIAN'S REPORT	
Name		-	
Phone ()			
Office Address			
What is your License/Certific	eation?		-
What is your area of specialty	y?		
I last examined the Person or	n:	, 20	
The Person is under my continuous YES, since NO			
2. Evaluation of the Person's	Physical Condition		
Physical Diagnosis:			
Severity: Mild Prognosis: Continuing	□ Moderate □ Degenerativ	☐ Severe ☐ Recovering ☐ Relapsing	
Treatment/Medical History/A	Additional Comments (attach additional pages, if necessary):	

3. I	Evaluation	n of the Pe	erson's Mental Fu	nctioning
The	e Person i □ Per		to the following ((check all that apply): □ Place □ Situation
Do	you have	concerns	about the Person'	's functioning in the following areas? (check all that apply)
	YES	NO	UNKNOWN	FUNCTION
-				Short-term memory
				Long-term memory
				Immediate recall
-				Understanding and communicating (verbally or otherwise)
-				Recognizing familiar objects and persons
				Solving problems
				Reasoning logically
				Grasping abstract aspects of his or her situation
•				Interpreting idiomatic expressions or proverbs
				Breaking down complex tasks into simple steps and carrying them out
Me	ntal Diag	nosis:		
Pro	verity: ognosis: eatment/M	□ Mild □ Conti		Degenerative □ Recovering □ Relapsing
	Madiantia	n Informa	tion	
4. I	viedicallo	n Informa	uon	
			erson currently ta 2 and 3? If "YES	king medication related to Person's physical or mental functioning S," please list:
Ad	ditional C	Comments	:	

5. Decision-Making

Is the Person able to make decisions regarding the following?

YES	WITH SUPPOR T	NO	UNKNOW N	ACTION/DECISION
				Make complex business, managerial, and/or financial decisions.
				Manage a personal bank account.
				If "YES," or "WITH SUPPORT," should amount deposited in any such bank account be limited? □ YES □ NO
				Pay his or her own bills.
				Safely operate a motor vehicle.
				Make decisions regarding marriage.
				Determine the Person's own residence.
				Live alone.
				Obtain food.
				Administer own medications daily.
				Attend to basic activities of daily living (ADLs) (e.g., bathing, grooming, dressing, walking, and/or toileting) with/out services.
				Attend to instrumental activities of daily living (e.g., shopping, cooking, traveling, and/or cleaning).
				Make appropriate judgments that will protect them personally, physically, and/or financially.
				Consent to medical and dental treatment.
				Consent to psychological and/or psychiatric treatment.

Additional Comments:				

"Incapacitated person" means an individual who:

- (1) cannot be located upon reasonable inquiry;
- (2) is unable:
 - (A) to manage in whole or in part the individual's property;
 - (B) to provide self-care; or
 - (C) both;

because of insanity, mental illness, mental deficiency, physical illness, infirmity, habitual drunkenness, excessive use of drugs, incarceration, confinement, detention, duress, fraud, undue influence of others on the individual, or other incapacity; or

(3) has a developmental disability (as defined in IC § 12-7-2-61).

Ind. Code § 29-3-1-7.5

- (a) "Less restrictive alternatives" means an approach to meeting a person's needs that restricts fewer rights of the person than would the appointment of the guardian.
- (b) "Less restrictive alternatives" may include, but are not limited to, the following:
 - (1) A supported decision making agreement (as defined in IC § 29-3-14-2).
 - (2) Appropriate technological assistance.
 - (3) The appointment of a representative payee.
 - (4) The appointment of a health care representative (as defined in IC § 16-36-1-2).
 - (5) The creation of a power of attorney (as defined in IC § 30-5-2-7).

Ind. Code § 29-3-1-7.8

6. Evaluation of Less Restrictive Alternatives

According to the definition in Ind. Code § 29-3-1-7.8 and based upon your last examination and observations of the Person, in your opinion, the following less restrictive alternatives could be considered or implemented:

T.F.G	N.O.	UN-	LESS RESTRICTIVE
YES	NO	KNOWN	ALTERNATIVE
			Supported decision making agreement
			Appropriate technological assistance
			Representative payee
			Health care representative
			Power of attorney
			Other

7. Evaluation of Capacity

observations of	of the Person, in your opinion, the Person is: incapacitated
□ Not	incapacitated with use of the following less restrictive alternative:
	ially incapacitated □ Personal OR □ Financial ally incapacitated
Additional Co	omments:
3. Recommen	dation of Living Arrangement
n your opinic Person?	on, what is the least restrictive living arrangement that you consider appropriate for the
	home with services □ Community based residence ed residence □ Hospital based residence
Additional Co	omments:
O. Ability to A	Attend Court Hearing
YES prever	There is no significant threat to the Person's health and/or safety that would not them from attending the court hearing.
ı NO	There is a significant threat to the Person's health and/or safety that would prevent them from attending the court hearing.
0. Additiona	l Information of Benefit to the Court
Please providencessary).	e any additional information that would benefit the court (attach additional pages, if

11. Additional Professional Evaluations

If the descriptions of the Person's condition or skills is based on evaluations or assistance by other professionals, please provide the names and contact information of those professionals who are able to provide additional information or evaluations.

Professional's Name	Phone ()
Office Address or E-mail	
Professional's Name	Phone ()
Office Address or E-mail	
I affirm under the penalties for perjury that the fo	oregoing representations are true.
Signature	Date
Name Printed	- -

Guardianship Information Sheet

Choose One* (☐ Individual ☐ Estate ☐ Estate and Individual)

Choose One* (☐ Minor ☐ Adult)

Choose One*(☐ Temporary ☐ Permanent)

Related Cases (List any cases in which the Protected Person is a party, e.g., CHINS)

Petitioner	Relations	hip to Protected Pe	rson*	
Last:*	Suffix:_	First:*	Middle:	
DOB:	Gender:*	Race:*	Hispanio	:?: Yes/No
Address:*				
		Phone:	Cell Phone:	
Email Address:*				
Attorney Name:		Bar Number:	App. Filed Date:	
Protected Person			Estimated Value \$	
Last:*	Suffix:_	First:*	Middle:	
			Hispanio	
			Weight: lbs	
Scars, Marks, and Tatt				
Address:*				
			Cell Phone:	
Email Address:*				
			App. Filed Date:	
Guardian Ad Litem Ful	l Name:			
Interpreter required?	Yes/No Langua	ge:		
Guardian Check if	same as petitione	r 🗆 Certifie	ed (Only check if Federal or State	Certified)
Last:*	Suffix:	First:*	Middle:	
DOB:			Hispanio	
Address:*				
		Phone:	Cell Phone:	
Email Address:*				
Attorney Name:		Bar Number:	App. Filed Date:	
Guardian Institution				
Name:*				
Address:*				
			Name:	
Close Relative (Entitle			ected Person	
Last:*	Suffix:	First:*	Middle:	
Gender:* Race				
Mailing Address:*				
			Cell Phone:	

Guardianship Information Sheet

(Additional)

Petitioner	Relationship to Prot	ected Person
Last:*	Suffix: First:*	Middle:
		Hispanic?: Yes/No
Address:*		
Home Phone:	Work Phone:	Cell Phone:
Email Address:		
Attorney Name:	Bar Number:	App. Filed Date:
Guardian Check if s	ame as petitioner Certific	ed (Only check if Federal or State Certified)
Last:*	Suffix: First:*	Middle:
DOB:	Gender:* Race:*	Hispanic?: Yes/No
Address:*		
Home Phone:	Work Phone:	Cell Phone:
Email Address:		
Attorney Name:	Bar Number:	App. Filed Date:
Close Relative (Entitled	to Notice) Relationship to Prot	ected Person
Last:*	Suffix: First:*	Middle:
	* Hispanic?: Yes/No	
Mailing Address:*		
Home Phone:	Work Phone:	Cell Phone:
Email Address:		
Interested Party		
Last:*	Suffix: First:*	Middle:
	* Hispanic?: Yes/No	
Address:*	· · ·	
Home Phone:	Work Phone:	Cell Phone:
Email Address:		
Interested Party		
Last:*	Suffix: First:*	Middle:
	* Hispanic?: Yes/No	
Home Phone:	Work Phone:	Cell Phone:
Email Address:		

GUARDIANSHIP FORM D COURT'S INSTRUCTIONS TO GUARDIAN OF ESTATE

STATE OF INDIANA	IN THE SUPERIOR COURT 2
COUNTY OF JOHNSON	CAUSE NO: 41D02
IN THE MATTER OF THE GUARDIAN	SHIP OF:

COURT'S INSTRUCTIONS TO GUARDIAN OF ESTATE

Please read carefully before you date and sign. One copy of this form must be filed with the Court before your appointment as guardian is confirmed by the Court. Keep one copy for vour records.

Introduction:

You have been appointed as the guardian of an individual who is unable to care for his or her own financial affairs. It is important that you fully realize your duties and responsibilities. Listed below are some of your duties, but not all of them.

If you are represented by an attorney of record, your attorney is required to notify the Court if you are not properly performing your fiduciary duties to the protected person, and by signing these Instructions you agree that the filing of that notice does not violate the attorney client privilege. If the Court receives such notice, it will set the matter for hearing and will require you to personally appear and account to the Court for all actions taken or not taken by you as guardian. You are required to notify the Court in writing in the event that your attorney is not timely performing or improperly performing his or her duties to reasonably supervise and guide your actions as guardian. Upon receipt of the notice, the Court will set the matter for hearing and require you and your attorney to personally appear and account to the Court for all actions taken or not taken by the attorney.

The Instructions which follow are to be considered by you as Orders of the Court which require you to perform as directed. Although your attorney will file all papers with the Court, the ultimate responsibility to see that all accounts and other documents are accurately prepared and filed, rests with you and you can be found personally liable should you not properly perform.

The Court appreciates your efforts on behalf of the protected person.

As Guardian you are required to:

- 1. Locate, collect and maintain all property owned by the protected person. Keep motor vehicles and real estate insured and protected. Keep motor vehicles and real estate insured and protected.
- 2. File with the Court, within ninety (90) days after your appointment, a verified inventory and appraisal of all the property belonging to the protected person, with values as of the date you were appointed. You must provide a copy of the inventory to the protected person [if over fourteen (14) years of age] and to certain other persons as set out in Indiana Code §29-3-9-5, as amended.

- 3. File with the Court a verified current account of all the income and expenditures of the guardianship every two (2) years after your appointment, in the statutory format prescribed by I.C. §29-1-16-4. Informal, handwritten, or transactional accountings will not be accepted.
- 4. Pay bond premiums as they become due.
- 5. File and pay taxes on the protected person's income and assets.
- 6. File a final accounting with the Court upon the termination of the guardianship, whether due to the death of the protected person, or for any other reason.
- 7. Keep all of the assets of the protected person separate from your own. Guardianship funds should never be co-mingled with personal funds. Unauthorized use of the guardianship funds will result in personal liability.
- 8. Open a guardianship checking account in your name "as guardian of (the protected person)". This account shall be used for all payments or disbursements on behalf of the protected person. The account should be in the protected person's Social Security number, not yours. It cannot be a joint account.
- 9. Real estate, automobiles and other accounts and investments should be held in the name of the protected person.
- 10. All investment accounts and other bank account holdings should be retitled as follows: "John Smith Guardianship, Mary Jones Guardian."
- 11. Obtain approval from the Court to use guardianship assets, other than for normal bills.
- 12. Do not self-deal. Do not buy anything from or sell anything to the protected person. Do not borrow anything from the protected person.
- 13. If applicable, timely qualify the protected person for Medicaid or other public assistance.
- 14. It is the duty of the guardian to protect and preserve the protected person's property, to account for the use of the property faithfully, and to perform all the duties required by law of a guardian.
- 15. The guardian has the same duties and responsibilities concerning the protected person whether or not the protected person is a relative of the guardian.
- 16. NEVER pay attorney fees or compensation to yourself from assets of the guardianship without first obtaining the advance written approval of the Court.
- 17. If any questions arise during the guardianship, immediately consult with your attorney.

I authorize my attorney to notify the Court in the event that he or she has reason to believe that I am not timely performing or improperly performing my fiduciary duties to the protected person even if such information would be otherwise confidential.

I acknowledge that I have carefully and completely discussed the above instructions with my client before this form was signed and believe that he or she is fully aware of and capable of performing the duties required of a guardian of the estate.

Print, Guardian

Print, Guardian

Signature, Guardian

Signature, Guardian

Print, Guardian

Print, Guardian

GUARDIANSHIP FORM C COURT'S INSTRUCTIONS TO GUARDIAN OF THE PERSON

STATE OF INDIANA	IN THE SUPERIOR COURT 2
COUNTY OF JOHNSON	CAUSE NO: 41D02
IN THE MATTER OF THE GUARDIANSHIP OF	

COURT'S INSTRUCTIONS TO GUARDIAN OF THE PERSON

Please read carefully before you date and sign. One copy of this form must be filed with the Court before your appointment as guardian is confirmed by the Court. Keep a copy for your records.

You have been appointed as the guardian of an individual who is unable to care for his or her own personal affairs. It is important that you fully realize your duties and responsibilities. Listed below are some of your duties.

If you are represented by an attorney of record, your attorney is required to notify the Court if you are not properly performing your duties to the protected person. By signing these Instructions you agree that the filing of that notice does not violate the attorney-client privilege. If the Court receives such notice it will set the matter for hearing and require you to personally appear and account to the Court for all actions taken or not taken by you as guardian.

The Instructions which follow are to be considered by you as Orders of the Court which require you to perform as directed. The Court appreciates your efforts on behalf of the protected person.

As Guardian of the person, you have the following duties and authority:

- 1. You must be or become sufficiently acquainted with the protected person and maintain sufficient contact with the protected person to know his or her capabilities, disabilities, limitations, needs, opportunities, and physical and mental health.
- 2. You are responsible to make sure the protected person has an adequate place to live that is appropriate for the protected person's needs. You can decide where the protected person will live. You must obtain **prior** approval of the Court before you move the protected person to another residence or health facility outside of Monroe County. In all other circumstances, you must notify the Court immediately in any change of residence.
- 3. You are responsible to make sure that the protected person receives needed and appropriate medical care. You can consent to medical or other professional care and treatment for the protected person's health and welfare. You can consent to the protected person's admission to a health care facility.
- 4. You shall, to the extent possible, encourage and promote the self-reliance and independence of the protected person.

- 5. You can, to the extent that the protected person is able, delegate to the protected person certain responsibilities for decisions affecting the protected person's wellbeing.
- 6. You or your attorney must notify the Court if your address, telephone number and/or e-mail address changes.
- 7. The guardian has the same duties and responsibilities concerning the protected person whether or not the protected person is a relative of the guardian.
- 8. You must file a report with the Court at least every two (2) years (reporting form attached). The report must state the present residence of the protected person and a statement of the protected person's current condition and general welfare. Failure to file the report may result in your removal as guardian.

I authorize my attorney to notify the Court in the event that he or she has reason to believe that I am not timely performing or am improperly performing my duties to the protected person even if such information would be otherwise confidential.

I acknowledge that I have carefully and completely read the above instructions and received a copy for my records. I agree to properly carry out my duties.

Dated thisday of	
Signature, Guardian	Signature, Guardian
Print, Guardian	Print, Guardian
my client before this form was	ally and completely discussed the above instructions with signed and believe that he or she is fully aware of and required of a guardian of the person.
Signature, Attorney	Signature, Attorney
Print. Attorney	