

**IN THE CIRCUIT COURT OF COOK COUNTY, ILLINOIS
COUNTY DEPARTMENT, PROBATE DIVISION**

File No. _____

Estate of

A Person with a Disability

INSTRUCTIONS TO GUARDIAN OF THE ESTATE OF A PERSON WITH A DISABILITY

You have been appointed Guardian of the Estate of the above-named person with a disability (the “Ward”). When you filed your bond and took your oath as Guardian, you became an officer of the Court and assumed certain duties and obligations. You should clearly understand the following requirements, but because the list is not exhaustive, your attorney is best qualified to advise you regarding these matters:

1. You must keep the Ward’s money and property separate from your own. When you open a bank account for guardianship funds, the account must be in your name as Guardian of the Estate of the above-named Ward. Securities must also be held in that manner. If you are Guardian for more than one Ward, you must keep a separate account for each Ward. Your surety who has posted the bond guaranteeing the Ward against loss may require joint control over withdrawals from the bank.
2. You are not permitted as Guardian to spend or lend the Ward’s money without a prior Order of the Court. You may have to reimburse the estate out of your own pocket for money which is disbursed without the Court’s prior permission. However, you may without an Order either pay directly or reimburse yourself for Court costs paid to the Clerk of Court and for premiums paid on your bond.
3. Within 60 days from the date of the Order appointing you as Guardian, you must present to the Court an Inventory listing all of the money, other property or cause of action(s) in which the Ward may have an interest.
4. Within 30 days after the expiration of one year from the date of the Order appointing you as Guardian, and annually thereafter, you must file a verified Account showing what you have received as Guardian, what money or other property you have collected, and what you have spent (and produce a receipt for each expenditure). The Account must also list the money and other property left at the end of the year.
5. You must obtain the Court’s permission to lease, sell, mortgage, or pledge real or personal property of the Ward, to initiate litigation on behalf of the Ward, or to invest the Ward’s funds other than as specifically authorized by the Probate Act of 1975.
6. You may be required to file annual income tax returns and make estimated income tax payments.
7. Your attorney is your representative before this Court. It is important that you cooperate with your attorney at all times so that you may be assisted in carrying out your responsibilities.

MARY ELLEN COGHLAN, Presiding Judge
Circuit Court of Cook County
Probate Division

I hereby acknowledge that I have read and understand the above instructions.

[signature of Guardian of the Estate] [date]

[printed name of Guardian of the Estate]