

**IN THE CIRCUIT COURT FOR LEE COUNTY, STATE OF FLORIDA,
GUARDIANSHIP, PROBATE AND MENTAL HEALTH DIVISION**

IN RE: THE GUARDIANSHIP OF

CASE NO.: _____

(Name)

**SIMPLIFIED ACCOUNTING (GUARDIANSHIP REPORT) OF GUARDIAN OF
PROPERTY**

FROM: _____ **THROUGH:** _____

_____, the guardian of the property of
_____ (the ward), submits the
following Simplified Accounting as the annual accounting of this guardian for the above-
referenced period:

1. Pursuant to order of this Court, all assets of the Ward are in the following designated
depositories under Sec. 69.031, Florida Statutes:

a.) _____
(Name of institution)

Account Number: _____ Balance at end of period \$ _____
(Must provide at least the last 4 digits)

b.) _____
(Name of institution)

Account Number: _____ Balance at end of period \$ _____
(Must provide at least the last 4 digits)

c.) _____
(Name of institution)

Account Number: _____ Balance at end of period \$ _____
(Must provide at least the last 4 digits)

CASH TOTAL \$ _____

2. The original or certified copies of the end-of-period statement(s) of the Ward's account(s) from the financial institution(s) are attached to this accounting*.

***Important Note: Please attach a copy of the bank statement that covers/shows the account balance as of the last date of the reporting period covered by this Simplified Accounting, for each account. In the alternative, a letter from the bank with a bank official's signature and business card attached, which states the asset amount as of that date, may be provided for each account.**

3. The only transactions that have occurred in the account(s) are interest accrual, deposits pursuant to settlement, or financial institution service charges.

Under penalties of perjury, I declare that, to the best of my knowledge and belief, this accounting is true and correct, and that I have custody and control of the Ward's property as set forth in the attached end-of-accounting-period statement(s).

Signed on _____, 20_____.

Guardian

Print Name: _____

Address: _____

Phone Number: _____

An attorney's signature is not required on a Simplified Accounting.