



Office of the
Public Guardian

Form
GS2

Guardian report form



Where to send the completed form

Post to:

Office of the Public Guardian
OPG Guardianship
PO Box 10795
Nottingham
NG2 9TZ

Email: guardianship@publicguardian.gov.uk

Cymraeg: this form is also available in Welsh. Email customerservices@publicguardian.gov.uk



How to fill in this form



You do not have to complete this form in one go

Why we ask you to fill in this form

This form:

- gives the Office of the Public Guardian (OPG) financial accounts
- tells us about decisions you've made for the person you're guardian for
- gives us information so that we can help you to act in the person's best interests

To fill in this form you'll need:

- financial records (for example, bank statements or spreadsheets)
- records of any money you spent on behalf of the person you're guardian for during this reporting period

More than one guardian?

If your order appoints two or more guardians with the same responsibilities, we only need you to fill in one copy of this form.

You should always consult any other guardians and make sure they see the final copy before you send your report to us.

More information

Make sure you answer the questions in this form as fully as possible. We may still need to contact you for more information – by telephone, email or in writing.

Your privacy

We'll treat any information you give us in line with the General Data Protection Regulation (GDPR) and the Data Protection Act 2018. This means we will not give it to anyone else unless we have a safeguarding concern or we have to apply to the court, when it would be available to anyone involved in the court proceedings.

Find out more at www.gov.uk/government/collections/privacy-notice-office-of-the-public-guardian

'You' and 'the person'

Where you see the word 'you' in this form, it means the guardian who is filling in the guardian report form. Where you see the words 'the person', it means the person you're appointed to make decisions for.



Guardianship report form

Section 1

Case details

OPG reference

Court reference

Where to find this number

Every letter from us will have your case number: look for 'OPG reference'.

Reporting period

Start date

Day Month Year

End date

Day Month Year

Your reporting period

Check the letter that came with this form: your reporting period is highlighted in **bold**.

Guardian details

First names

Last name

Address

Postcode

Telephone number

Email

The person's details

First names

Last name

Last known address

Postcode



List the decisions you've made such as about buying or selling property, making gifts:

Need more space? Use the extra sheet supplied with this form

Check this box if you did not make any significant decisions, and tell us why



Section 3

People you consulted

Helpline
0115 934 2819



Give details of people who helped you make significant decisions as a guardian such as an accountant, solicitor, financial advisor or the person's family members.

For example: "Peter Jones", "Accountant", "To prepare accounts for the guardian report."

If you paid for services you can give details later in this form.

Full name <input type="text"/>	Relationship to the person <input type="text"/>
Address <input type="text"/> <input type="text"/> <input type="text"/>	Why did you consult them? <input type="text"/>
Postcode <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	

Full name <input type="text"/>	Relationship to the person <input type="text"/>
Address <input type="text"/> <input type="text"/> <input type="text"/>	Why did you consult them? <input type="text"/>
Postcode <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	

Full name <input type="text"/>	Relationship to the person <input type="text"/>
Address <input type="text"/> <input type="text"/> <input type="text"/>	Why did you consult them? <input type="text"/>
Postcode <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	

Check this box if you did not consult anyone, and tell us why

Need to add more people? Use the extra sheet supplied with this form

The person's accounts and assets

Section 4: the person's main bank account

Use section 4 to tell us about the main bank account or accounts you use regularly to receive money and make payments on behalf of the person. For most people, this is the person's current account, and they usually just have one.

You will need to give more detail for some payments in or out. Those are marked with an **i**.

Section 4: more than one account?

If the person has more than one account you use regularly, use the extra sheets (make copies if you need to).

Don't use section 4 for any other accounts that you use for savings only, such as investment bonds or ISAs. List these in section 5 (the person's assets and debts). If the person has a savings account that you make payments from, fill in a copy of section 4 for this account.

Section 5: the person's assets and debts

If the person has any of these assets, you will have to give us more information. You can use this checklist to help you prepare for section 5.

- Property (page 12)
- Savings accounts and cash ISAs (page 13)
- Investments (managed under an investment portfolio) (page 13)
- Stocks and shares (not managed under an investment portfolio) (page 14)
- Premium Bonds (page 15)
- Vehicles (page 15)
- Cash in hand (page 15)
- Assets held outside England and Wales (page 15)
- Other valuable assets (page 16)
- Assets held in trust (page 17)

If the person owes any money, for example care fees for dependents, loans or credit cards, list them on page 18.

You should also tell us on page 18 if you have had independent financial advice on behalf of the person.

Section 4

Bank accounts

Helpline
0115 934 2819



Summary of money paid in

List the income going into the person's main bank account

Bank/building society name <input type="text"/>	Account type <input type="text"/>
Branch sort code <input type="text"/> - <input type="text"/> - <input type="text"/>	Last four digits of account number <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

i If you write in a row with this symbol, give more information on the next page.

The person's money paid in		Total for reporting period
Account interest	£	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Bequests, for example inheritance, gifts received	£	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Income from investments, dividends or property rental	£	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Personal pension (total)	£	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Refunds	£	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Salary or wages (after tax)	£	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
i Benefits	£	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
i Compensation or damages awards	£	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
i Sale of investments, property or assets (total)	£	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
i Transfers in from person's other accounts	£	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
i Other money paid in and not listed above (total)	£	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
TOTAL		£ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

More than one account? Use the extra sheets supplied with this form

Section 4 – bank accounts – continued

If you have written anything in a row marked **i** on page 5, give more detail below

More detail on money paid in

Last four digits of account number

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i Compensation or damages awards, sale of investments, property or assets, and other money in

Description (if sale of property, give address)

Date(s)

Value

Description (if sale of property, give address)	Date(s)	Value

i Transfers in from the person's other accounts

Description (include last four digits of the account the money was transferred from)

Date(s)

Value

Description (include last four digits of the account the money was transferred from)	Date(s)	Value



i Benefits

Description	Dates	Value

Tell us about any income received by someone other than you on behalf of the person

No income is received this way

Type of income

Amount

£

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 .

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Section 4 – bank accounts – continued

Summary of money paid out











List the payments going out of the person's main bank account

Last four digits of account number

--	--	--	--



If you write in a row with this symbol, give more information on the next two pages

Accommodation costs, for example rent, mortgage, service charges	£	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Debt payments, for example loans, cards (Also see debts section)	£	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Guardian's security bond	£	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Household bills, for example water, electricity, phone, council tax	£	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Insurance, for example life, home and contents, pets	£	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Office of the Public Guardian and Court fees	£	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Tax payable to HMRC, for example tax on rental income	£	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
 Financial support to others	£	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
 Cash you have withdrawn	£	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
 Professional fees, for example solicitor or accountant fees	£	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
 Guardian's expenses	£	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
 Gifts, for example a registered charity	£	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
 Transfers out to the person's other accounts	£	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
 Major purchases, for example property, vehicles	£	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
 Property maintenance or improvement	£	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
 New investments, for example shares, bonds	£	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
 Other money paid out and not listed above (total)	£	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

TOTAL £

More than one account? Use the extra sheets supplied with this form

Section 4 – bank accounts – continued

If you have written anything in a row marked **i** on page 8, give more detail below

More detail on money paid out

Last four digits of account number

--	--	--	--

i Financial support to others

Description	Date(s)	Value

i Cash you have withdrawn

Description	Date(s)	Value

i Professional fees

Description e.g. solicitor or accountant fees	Date(s)	Value

Section 4 – bank accounts – continued

If you have written anything in a row marked **i** on page 8, give more detail below

More detail on money paid out

Last four digits of account number

--	--	--	--

i Guardian's expenses

Description	Date(s)	Value

i Gifts

Description e.g. "registered charity," "Niece, 21st birthday"	Date(s)	Value

i Transfers out to the person's other accounts

Description	Date(s)	Value

Section 4 – bank accounts – continued

If you have written anything in a row marked **i** on page 8, give more detail below

More detail on money paid out

Last four digits of account number

--	--	--	--



Major purchases for example property, vehicles, property maintenance or improvement.
New investments for example buying shares or new bonds and any other expenses

Description

Date(s)

Value

Description	Date(s)	Value

Section 4 – bank accounts – continued

Balancing the account

Show us how the money going in and out of the person's main bank account balances against the bank statement

Last four digits of account number

--	--	--	--

Opening balance for reporting period
(as shown on bank statement)

£

--	--	--	--	--	--	--	--	--	--

 .

--	--

Box 1

Total money paid in
(as shown at the bottom of page 5)

£

--	--	--	--	--	--	--	--	--	--

 .

--	--

Box 2

Sub-total 1
(box 1 plus box 2)

£

--	--	--	--	--	--	--	--	--	--

 .

--	--

Box 3

Total money paid out
(as shown at the bottom of page 8)

£

--	--	--	--	--	--	--	--	--	--

 .

--	--

Box 4

Sub-total 2
(box 3 minus box 4)

£

--	--	--	--	--	--	--	--	--	--

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Box 5

Closing balance for reporting period
(as shown on bank statement)

£

--	--	--	--	--	--	--	--	--	--

 .

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Box 6

If the figures in box 5 and box 6 are different, tell us why (for example, if you've rounded up or down any amounts or you have used a different date to that on the bank statement)

--

If the dates used to calculate the opening and closing balances are different from the reporting period shown on page 1, write the dates you used below

From

--	--

 /

--	--

 /

--	--	--	--

Day Month Year

To

--	--

 /

--	--

 /

--	--	--	--

Day Month Year

Tell us why the dates are different

--

Section 5

The person's assets and debts

Helpline
0115 935 2819



Property

Address

Postcode

--	--	--	--	--	--	--	--	--	--

Who lives at this property?

- The person's spouse/partner/civil partner
- The person's parent(s)
- The person's children/other dependants
- Property is empty
- Other (for example, private tenant)

If other, tell us more:

Is the property fully or part-owned by the person?

- Fully owned Part-owned

If part-owned, what is the person's share of the property?

%

Is the property subject to an equity release scheme?

- Yes No

Estimated total / full value of property

£

Is there an outstanding mortgage?

- Yes No

If Yes, how much is there left to pay?

£

Are there any other charges on the property?

For example, local authority charge to recover care fees

- Yes No

Is the property rented out?

- Yes No

If Yes, when does the rental agreement end?

Month Year

Rental income (per month)

£

More than one property? Use the extra sheets supplied with this form

Section 5 – The person’s assets and debts – continued

Savings accounts and cash ISAs

For example, savings accounts, investment bonds, cash ISAs, National Savings Certificates

Bank/building society name	Last four digits of account	Closing balance at the end of reporting period
<input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	£ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
<input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	£ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
<input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	£ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
<input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	£ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

Investments (managed under an investment portfolio)

For example, unit trusts, open-ended investment companies

Company name	Date of valuation		Total value
<input type="text"/>	<input type="text"/> <input type="text"/> Month	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> Year	£ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
<input type="text"/>	<input type="text"/> <input type="text"/> Month	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> Year	£ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

More savings and investments? Use the extra sheets supplied with this form

Section 5 – The person’s assets and debts – continued

Stocks and shares (not managed under an investment portfolio)

Don't include shares that are part of another investment

Description		
<input type="text"/>		
Number held	Date of estimate	Total estimated value
<input type="text"/>	<input type="text"/> <input type="text"/> Month Year	£ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Description		
<input type="text"/>		
Number held	Date of estimate	Total estimated value
<input type="text"/>	<input type="text"/> <input type="text"/> Month Year	£ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Description		
<input type="text"/>		
Number held	Date of estimate	Total estimated value
<input type="text"/>	<input type="text"/> <input type="text"/> Month Year	£ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Description		
<input type="text"/>		
Number held	Date of estimate	Total estimated value
<input type="text"/>	<input type="text"/> <input type="text"/> Month Year	£ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

More stocks and shares? Use the extra sheets supplied with this form

Section 5 – The person’s assets and debts – continued

Premium Bonds

Date of valuation

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
----------------------	----------------------	----------------------	----------------------	----------------------	----------------------

Month

Year

Total value

£

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	.	<input type="text"/>	<input type="text"/>
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Vehicles

For example, cars, caravans, motor homes, boats, motorbikes

Details (make, model number, year of registration)

--

Total value or estimate

£

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	.	<input type="text"/>	<input type="text"/>
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Cash in hand

Amount of cash held at the end of the reporting period: Value

£

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	.	<input type="text"/>	<input type="text"/>
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Assets held outside England and Wales

For example, property, investments

Details

--

Total value or estimate

£

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	.	<input type="text"/>	<input type="text"/>
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Date of valuation or estimate

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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Month

Year

If you are planning to do anything with these assets in the future, tell us here

--

Section 5 – The person’s assets and debts – continued

Other valuable assets

For example, artworks, collections or anything you or the person has insured separately

Brief description of item	Date of valuation		Value
<input type="text"/>	<input type="text"/> Month	<input type="text"/> Year	£ <input type="text"/> . <input type="text"/>
<input type="text"/>	<input type="text"/> Month	<input type="text"/> Year	£ <input type="text"/> . <input type="text"/>
<input type="text"/>	<input type="text"/> Month	<input type="text"/> Year	£ <input type="text"/> . <input type="text"/>
<input type="text"/>	<input type="text"/> Month	<input type="text"/> Year	£ <input type="text"/> . <input type="text"/>
<input type="text"/>	<input type="text"/> Month	<input type="text"/> Year	£ <input type="text"/> . <input type="text"/>
<input type="text"/>	<input type="text"/> Month	<input type="text"/> Year	£ <input type="text"/> . <input type="text"/>
<input type="text"/>	<input type="text"/> Month	<input type="text"/> Year	£ <input type="text"/> . <input type="text"/>
<input type="text"/>	<input type="text"/> Month	<input type="text"/> Year	£ <input type="text"/> . <input type="text"/>
<input type="text"/>	<input type="text"/> Month	<input type="text"/> Year	£ <input type="text"/> . <input type="text"/>
<input type="text"/>	<input type="text"/> Month	<input type="text"/> Year	£ <input type="text"/> . <input type="text"/>
<input type="text"/>	<input type="text"/> Month	<input type="text"/> Year	£ <input type="text"/> . <input type="text"/>
<input type="text"/>	<input type="text"/> Month	<input type="text"/> Year	£ <input type="text"/> . <input type="text"/>
<input type="text"/>	<input type="text"/> Month	<input type="text"/> Year	£ <input type="text"/> . <input type="text"/>

Section 5 – The person’s assets and debts – continued

Assets held in trust

A trust is a way of managing assets (money, investments, land or buildings) for someone who can’t handle their own affairs.

Have any of the person’s assets been placed in a trust in this reporting period or in the past?

We need to know details of the trustees (the people who manage the trust), any other beneficiaries (people who benefit from the trust) and the value of the assets in the trust. (This can be an estimated value.)

Yes (tell us more) No

Has the person received any income or capital from a trust in the reporting period?

If so, tell us how much. £ .

Have the trustees sent you accounts for the trust?

Yes No

If Yes, what is the date of these accounts?
Day Month Year

If you do not have copies of the trust deed(s), ask the trustees to send some to you. It’s a good idea to have copies for your records, and we may need to see them as well.

Section 5 – the person’s assets and debts – continued

Financial advice

Have you taken independent financial advice on behalf of the person?

Some Guardianship court orders state that a guardian must take financial advice on behalf of the person. Even if your court order doesn’t mention financial advice, you should make sure the person whose affairs you are looking after is getting the most out of their assets and investments.

Yes No

If Yes, when?
Month Year

If you took independent advice in the reporting period you will need to include details in ‘Professional fees’ in Section 4 and in the ‘People you consulted’ in Section 3.

Debts owed by the person

Go back to page 12 to tell us about any amount left to pay on a mortgage.

Debts owed	Total value
Credit cards	£ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/>
Loans	£ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/>
Others (please state below)	£ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/>



Do you expect to make any decisions on behalf of the person in the next reporting period?

For example, buying or selling property or making adaptations to their home, changing their investments, making large gifts (such as a 21st birthday present for their child).

Yes (tell us more) No

Do you have any concerns about your guardianship?

For example, managing the person's property, making gifts, other family members' involvement with the person's funds, what expenses you can claim.

Yes (tell us more) No

Section 7

Guardian's declaration

Helpline
0115 934 2819



I confirm that the information I have given in this report is true and correct to the best of my knowledge and belief. I understand I have obligations to the High Court and the Office of the Public Guardian and that if I knowingly provide false or misleading information there may be legal consequences.

I am signing this report on behalf of myself and, where applicable, each of the guardians named in the court order (unless I have stated otherwise and provided reasons).

I confirm that I have had regard to the Guardianship Act 2017, its Code of Practice and the court order in this case. I understand the duties and obligations placed on me.

Guardian's signature

Date

Day

Month

Year

Check this box if you are not signing on behalf of all guardians (if there is more than one guardian)

Tell us why

Where to send the completed form

Post to:

Office of the Public Guardian
OPG Guardianship
PO Box 10795
Nottingham
NG2 9TZ

Email: guardianship@publicguardian.gov.uk

Extra sheets

If you need to, you can make extra photocopies of these sheets to send with your report

Extra sheets available:

- Section 2 – Significant decisions
- Section 3 – People you consulted
- Section 4 – Bank accounts
- Section 5 – The person's assets and debts

This page is not part of the form

Decisions made over the reporting period

Significant decisions

Guardian decisions

--

Section 3 – extra sheet

People you consulted

Full name

Address

Postcode

Relationship to the person

Why did you consult them?

Full name

Address

Postcode

Relationship to the person

Why did you consult them?

Full name

Address

Postcode

Relationship to the person

Why did you consult them?

Full name

Address

Postcode

Relationship to the person

Why did you consult them?

Section 4 – extra sheet

Bank accounts

Summary of money paid in

List the income going into the person's main bank accounts

The person's name

Bank/building society name

Account type

Branch sort code

 - -

Last four digits of account number



If you write in a row with this symbol, give more information on the next page.

The person's money paid in

Total for reporting period

Account interest	£	<input type="text"/>	<input type="text"/>
Bequests, for example inheritance, gifts received	£	<input type="text"/>	<input type="text"/>
Income from investments, dividends or property rental	£	<input type="text"/>	<input type="text"/>
Personal pensions (total)	£	<input type="text"/>	<input type="text"/>
Refunds	£	<input type="text"/>	<input type="text"/>
Salary or wages (after tax)	£	<input type="text"/>	<input type="text"/>
Benefits	£	<input type="text"/>	<input type="text"/>
Compensation or damages awards	£	<input type="text"/>	<input type="text"/>
Sale of investments, property or assets (total)	£	<input type="text"/>	<input type="text"/>
Transfers in from the persons other accounts	£	<input type="text"/>	<input type="text"/>
Other money paid in and not listed above (total)	£	<input type="text"/>	<input type="text"/>

TOTAL £

Section 4 – continued – extra sheet

If you have written anything in a row marked **i** on page 5, give more detail below

More detail on money paid in

Last four digits of account number

--	--	--	--

i Compensation or damages awards, sale of investments, property or assets, and other money in

Description (if sale of property, give address)

Date(s)

Value

Description (if sale of property, give address)	Date(s)	Value

i Transfers in from the person's other accounts and any benefits received

Description (include last four digits of the account)

Date(s)

Value

Description (include last four digits of the account)	Date(s)	Value

Section 4 – continued – extra sheet

Summary of money paid out

List the payments going out of the person's main bank account

Last four digits of account number

--	--	--	--



If you write in a row with this symbol, give more information on the next page.

Client's money paid out	Total for reporting period	
Accommodation costs, for example rent, mortgage, service charges	£	[][][][][][] . [][]
Debt payments, for example loans, cards, care fee arrears	£	[][][][][][] . [][]
Guardian's security bond	£	[][][][][][] . [][]
Household bills, for example water, electricity, phone, council tax	£	[][][][][][] . [][]
Insurance, for example life, home and contents, pets	£	[][][][][][] . [][]
Office of the Public Guardian fees	£	[][][][][][] . [][]
Tax payable to HMRC, for example tax on rental income	£	[][][][][][] . [][]
i Financial support for others	£	[][][][][][] . [][]
i Cash you have withdrawn	£	[][][][][][] . [][]
i Professional fees, for example solicitor or accountant fees	£	[][][][][][] . [][]
i Guardian's expenses	£	[][][][][][] . [][]
i Gifts, for example a registered charity	£	[][][][][][] . [][]
i Transfers out to client's other accounts	£	[][][][][][] . [][]
i Major purchases, for example property, vehicles	£	[][][][][][] . [][]
i Property maintenance or improvement	£	[][][][][][][] . [][]
i New investments, for example shares, bonds	£	[][][][][][][] . [][]
i Other money paid out and not listed above (total)	£	[][][][][][][][] . [][]
TOTAL £		[][][][][][][][] . [][]

Section 4 – continued – extra sheet

If you have written anything in a row marked **i** on page 8, give more detail below

More detail on money paid out

Last four digits of account number

--	--	--	--

i Financial support for others

Description	Date(s)	Value

i Cash you have withdrawn

Description	Date(s)	Value

i Professional fees and any guardian expenses

Description	Date(s)	Value

Section 4 – continued – extra sheet

If you have written anything in a row marked **i** on page 9,
give more detail below

More detail on money paid out

Last four digits of account number

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i Gifts (to other people or donations to charities)

Description (for example registered charity, "Niece, 21st birthday") Date(s) Value

Description (for example registered charity, "Niece, 21st birthday")	Date(s)	Value

i Transfers out to the person's other accounts (include last four digits of the account the money was transferred from)

Description Date(s) Value

Description	Date(s)	Value

i Major purchases (for example, property, vehicles) and property maintenance or improvement; new investments (for example, buying shares, new bonds) and any other expenses

Description Date(s) Value

Description	Date(s)	Value

Section 4 – continued – extra sheet

Balancing the account

Show us how the money going in and out of the person's main bank account balances against the bank statement

Last four digits of account number

Opening balance for reporting period
(as shown on bank statement)

£

Box 1

Total money paid in
(as shown at the bottom of page 7)

£

Box 2

Sub-total 1
(box 1 plus box 2)

£

Box 3

Total money paid out
(as shown at the bottom of page 9)

£

Box 4

Sub-total 2
(box 3 minus box 4)

£

Box 5

Closing balance for reporting period
(as shown on bank statement)

£

Box 6

If the figures in box 5 and box 6 are different, tell us why (for example, if you've rounded up or down any amounts or you have used a different date on the bank statement)

If the dates used to calculate the opening and closing balances are different from the reporting period shown on page 1, write the dates you used below

From
Day Month Year

To
Day Month Year

Tell us why the dates are different.

Section 5 – extra sheet

The person's assets and debts

Property

Address

Postcode

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Who lives at this property?

- The person's spouse/partner/civil partner
- The person's parent(s)
- The person's children/other dependants
- Property is empty
- Other (for example, private tenant)

If other, tell us more.

--

Is the property fully or part-owned by the person?

- Fully owned Part-owned

If part-owned, what is the person's share of the property?

%

Is the property subject to an equity release scheme?

- Yes No

Estimated total / full value of property

£ .

Is there an outstanding mortgage?

- Yes No

If Yes, how much is there left to pay?

£ .

Are there any other charges on the property?
For example, local authority to recover care fees

- Yes No

Is the property rented out?

- Yes No

If Yes, when does the rental agreement end?

Month Year

Rental income (per month)

£ .

Section 5– continued – extra sheet

Stocks and shares (not managed under an investment portfolio)

Don't include shares that are part of another investment

Description

Number held

Date of estimate

Month			Year				

Total estimated value

£ .

Description

Number held

Date of estimate

Month			Year				

Total estimated value

£ .

Description

Number held

Date of estimate

Month			Year				

Total estimated value

£ .

Description

Number held

Date of estimate

Month			Year				

Total estimated value

£ .

Description

Number held

Date of estimate

Month			Year				

Total estimated value

£ .