

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

GS2

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-notices-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 End date Day Month Year Day	Your reporting period Check the letter that came with this form: your reporting period is highlighted in bold.
Guardian details First names	The person's details First names
Last name	Last name
Address	Last known address
Postcode Telephone number	Postcode
Email	

Section 2

Decisions made over the reporting period



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



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	Relationship to the person
Tuttifame	Retationship to the person
Address	Why did you consult them?
Postcode	
Full name	Relationship to the person
Address	Why did you consult them?
Postcode	
Full name	Relationship to the person
Full name	Relationship to the person
Full name Address	
	Relationship to the person Why did you consult them?
Address	
Address	
Address	Why did you consult them?
Address Postcode	Why did you consult them?
Address Postcode	Why did you consult them?
Address Postcode	Why did you consult them?
Address Postcode	Why did you consult them?
Address Postcode	Why did you consult them? Indicate the state of the stat

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 1.

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

e person has any of these assets, you will have to give us more information. 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 0300 456 0300

Summary of money paid in

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

Bank/building society name Branch sort code -	Account type Last four digits of account number			If you write with this s more infor the next p				ymb mati	ol, gi	ve
The person's money paid in				1	Γotal f	or rep	oort	ing	perio	od
Account interest		£								
Bequests, for example inheritance	, gifts received	£								
Income from investments, dividend	ds or property rental	£								
Personal pension (total)		£								
Refunds		£								
Salary or wages (after tax)		£								
f Benefits		£								
f Compensation or damages aw	vards	£								$\overline{\Box}$
Sale of investments, property	or assets (total)	£								
Transfers in from person's oth	er accounts	£								텎
Other money paid in and not l	isted above (total)	£								
	TOTAL	r.								

	More than one account?	Use the	extra	sheets	supplied	with	this	form
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Section 4 - bank accounts - continued

detail below			
More detail on money paid in	Last four digits of account number		
Compensation or damages awards, sale of	investments, property or ass	ets, and other money in	
Description (if sale of property, give address)	Date(s)	Value	
Transfers in from the person's other accounts			
Description (include last four digits of the account the money was transferred from)	nt Date(s)	Value	

Section 4 – bank accounts – continued

i Benefits			
Description		Dates	Value
Tell us about any income received by someone	other than vo	on behalf of the ne	rson
No income is received this way	other than yo	ou on behalf of the pe	13011
Type of income	Amount		
	£		

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	_		e in a ro inform		_	ages	
Accommodation costs, for example rent, i	mortgage, service charg	es	£				
Debt payments, for example loans, cards	(Also see debts section)	£				Ī
Guardian's security bond			£				Ī
Household bills, for example water, elect	ricity, phone, council tax	<	£				Ī
Insurance, for example life, home and cor	ntents, pets		£				Ī
Office of the Public Guardian and Court fo	ees		£				Ī
Tax payable to HMRC, for example tax on	rental income		£			İ	Ī
f Financial support to others			£				Ī
Cash you have withdrawn			£				Ī
fi Professional fees, for example solicit	or or accountant fees		£				٦
f Guardian's expenses			£				Ī
Gifts, for example a registered charit	у		£				
Transfers out to the person's other a	ccounts	£					
Major purchases, for example proper	ty, vehicles	£					Ī
Property maintenance or improvement	nt	£					
New investments, for example share:	s, bonds	£					
Other money paid out and not listed	above (total)	£					
	TOTAL £						
More than one account? Use the ext	tra sheets supplied with	this	form				

Section 4 - bank accounts - continued

More detail on money paid out	Last four digits of account	number
i Financial support to others Description	Date(s)	Value
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

1ore detail on money paid out	Last four digits of account n	umber
Guardian's expenses Description	Date(s)	Value
	2413(3)	
fi Gifts		
Description e.g. "registered charity," "Niece, 21st birth	hday" Date(s)	Value
Transfers out to the person's other accoun	nts	
Description	Date(s)	Value

Section 4 - bank accounts - continued

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

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)	f .	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)	£	Box 5
Closing balance for reporting period (as shown on bank statement)	£	Box 6
If the figures in box 5 and box 6 are direction amounts or you have used a different of	ifferent, tell us why (for example, if you've rounded up or date to that on the bank statement)	down any
If the dates used to calculate the oper shown on page 1, write the dates you to the date you to the dates you have you	ning and closing balances are different from the reporting used below To Day Month Year	g period
Tell us why the dates are different		

Section 5

The person's assets and debts



Property

Address Postcode	
Who lives at this property?	Estimated total / full value of property £
The person's spouse/partner/civil partner The person's parent(s)	Is there an outstanding mortgage? Yes No
The person's children/other dependants Property is empty	If Yes, how much is there left to pay? £
Other (for example, private tenant) If other, tell us more:	Are there any other charges on the property? For example, local authority charge to recover care fees Yes No
Is the property fully or part-owned by the person? Fully owned Part-owned	Is the property rented out? Yes No
If part-owned, what is the person's share of the property?	If Yes, when does the rental agreement end? Month Year
Is the property subject to an equity release scheme? Yes No	Rental income (per month) £
More than one property? Use the extra sheets	supplied with this form

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		
			£ .		
			£		
			£		
			£		
Investments (managed u	ınder a	n investment	portfolio)		
For example, unit trusts, open-end			•		
Company name	Date of	valuation	Total value		
	Month	Year	£		
	Month	Year	£		
More savings and investme					

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

Premium Bonds	
Date of valuation Month Year	Total value £
Vehicles For example, cars, caravans, motor homes, boats, mo	otorbikes
Details (make, model number, year of registration)	Total value or estimate £
Cash in hand	
Amount of cash held at the end of the reporting period	Value : £
Assets held outside England and Wales For example, property, investments	s
Details	Total value or estimate £ Date of valuation or estimate Month Year
If you are planning to do anything with these assets in	n the future, tell us here

Other valuable assets

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

Brief description of item	Date of valuation	Value
	Month Year	£

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.

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. £
Here the twisters continue accounts for the twist?
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.

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	£					<u> </u>	
Loans	£						
Others (please state below)	£						

Section 6

Decisions in the next reporting period



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



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:

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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

Section 2 - extra sheet

Decisions made over the reporting period

Significant decisions

Guardian decisions		

Section 3 – extra sheet

People you consulted

Full name	Relationship to the person
Address	Why did you consult them?
Postcode	
Full name	Relationship to the person
Address	Why did you consult them?
Postcode	
Full name	Relationship to the person
Address	Why did you consult them?
Postcode	
Full name	Relationship to the person
Address	Why did you consult them?
Postcode	

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 ac	count numl	per	U	with this	te in a row symbol, giv ormation or page.	
The person's money paid in				Total	for repo	orting perio	od
Account interest		£					
Bequests, for example inheritance, g	gifts received	£				•	
Income from investments, dividends	or property rental	£					
Personal pensions (total)		£					
Refunds		£				•	
Salary or wages (after tax)		£				•	
Benefits		£					
Compensation or damages awards		£					
Sale of investments, property or assets (total)		£					
Transfers in from the persons of	her accounts	£				•	
Other money paid in and not list	ted above (total)	£					
	ТО	TAL £					

More detail on money paid in	Last four digits of account num	aber
Compensation or damages awards, sale of	investments, property or assets,	, and other money in
Description (if sale of property, give address)	Date(s)	Value
Transfers in from the person's other accord	unts and any bonofits received	
Description (include last four digits of the account		Value

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	£ .
Cash you have withdrawn	£ .
Professional fees, for example solicitor or accountant fees	£ .
Guardian's expenses	£ .
Gifts, for example a registered charity	£ .
Transfers out to client's other accounts	£ .
Major purchases, for example property, vehicles	£ .
Property maintenance or improvement £	
New investments, for example shares, bonds £	
Other money paid out and not listed above (total)	
TOTAL £	

More detail on money paid out	Last four digits of account number		
i Financial support for others			
Description	Date(s)	Value	
A			
Cash you have withdrawn			
Description	Date(s)	Value	
Professional fees and any guardian expense	es		
Description	Date(s)	Value	

More detail on money paid out	Last four digits of account number				
Gifts (to other people or donations to charities)					
Description (for example registered charity", "Niece,	, 21st birthday") Date(s)	Value			
Transfers out to the person's other account the account the money was transferred from					
Description	Date(s)	Value			
Major purchases (for example, property, vonew investments (for example, buying sha					
Description	Date(s)	Value			

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, t amounts or you have used a different date on t	rell us why (for example, if you've rounded up or the bank statement)	down any
If the dates used to calculate the opening and shown on page 1, write the dates you used belo	closing balances are different from the reporting	g period
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	
Who lives at this property?	Estimated total / full value of property
The person's spouse/partner/civil partner The person's parent(s) The person's children/other dependants	Is there an outstanding mortgage? Yes No If Yes, how much is there left to pay?
Other (for example, private tenant) If other, tell us more.	Are there any other charges on the property? For example, local authority to recover care fees Yes No
Is the property fully or part-owned by the person? Fully owned Part-owned	Is the property rented out? Yes No
If part-owned, what is the person's share of the property?	If Yes, when does the rental agreement end? Month Year
Is the property subject to an equity release scheme? Yes No	Rental income (per month) £

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 Month Month	Total estimated value £