

PROBATE COURT OF FRANKLIN COUNTY, OHIO

JEFFREY D. MACKEY, JUDGE

GUARDIANSHIP OF _____
CASE NO. _____

PROSPECTIVE WARD'S FINANCIAL INFORMATION

The prospective ward's finances include the following. **[Check all boxes that apply.]**

Benefits:

☐ Social Security: _____ per month

☐ There is a representative payee: _____

☐ P.E.R.S.: _____ per month

☐ V.A. Benefits: _____ per month

☐ Railroad Retirement: _____ per month

☐ Other Pension(s): _____ per month

Source: _____

☐ Medicaid

☐ The prospective ward is eligible for Medicaid AND lives in a nursing home or other facility which receives all of the prospective ward's income.

☐ Other Insurance Benefits: _____

☐ Other: _____

Financial Accounts in the Prospective Ward's name:

Institution (PNC, Fidelity, etc.)	Type (checking, brokerage, etc.)	Estimated Balance

Real Estate Interests:

☐ The prospective ward owns real estate located at the following address(es): _____

☐ The prospective ward receives rental income in the amount of _____ per month.

Estate and Trust Interests:

☐ The prospective ward is the beneficiary of:

☐ a special needs trust.

☐ any other trust.

☐ a decedent's estate.

Identifying information of the estate or trust (e.g., name of decedent or settlor, case number, court overseeing the trust or estate, name of trustee, etc.): _____

Other Income or Assets (cash, securities, royalties, etc.):

Source and amount: _____

Application to Determine Indigent Status

(Request to Avoid Court Costs for Prospective Ward)

Based on the financial information above, I believe that the prospective ward:

☐ has enough funds available in their own name to pay court costs.

☐ does not have enough funds in their own name to pay court costs. The court should consider whether the proposed ward can be considered indigent.

Applicant Guardian