

**PROBATE COURT OF FRANKLIN COUNTY, OHIO**  
**JEFFREY D. MACKEY, JUDGE**

IN THE MATTER OF  
 THE GUARDIANSHIP OF \_\_\_\_\_

CASE NO. \_\_\_\_\_

**PROSPECTIVE WARD'S FINANCIAL INFORMATION**

Now comes the Applicant for appointment of guardian of the person and/or estate of the above captioned person and answers the following questions with respect to the Prospective Ward.

1. Is the Prospective Ward eligible for or receiving any of the following benefits, and if so, where are they or their source located?

<b>Type</b>	<b>Name/Location</b>	<b>Amount Per Month</b>
Social Security	_____	\$ _____
P.E.R.S.	_____	\$ _____
Veterans Administration	_____	\$ _____
R.R. Retirement	_____	\$ _____
Employee's Pension	_____	\$ _____
Insurance Benefits	_____	\$ _____
Other	_____	\$ _____

2. Does the Prospective Ward have an interest in an estate or trust? If so, give the decedent's name, court case number, name and location of the court, or trustee, etc.: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

3. Is the Prospective Ward the beneficiary of a special needs trust?  Yes  No

4. Cash?  Yes  No Amount: \$ \_\_\_\_\_

5. Bank, Savings and Loan, Brokerage and other financial accounts described below:

Institution	Address	Account Type	Current Balance
_____	_____	_____	\$ _____
_____	_____	_____	\$ _____
_____	_____	_____	\$ _____
_____	_____	_____	\$ _____

6. Securities?  Yes  No [if yes, describe below.]

Issuer	Balance
_____	\$ _____
_____	\$ _____
_____	\$ _____

7. Rental income from real estate?  Yes  No [if yes, describe below.]

Address Of Real Estate	Amt. Per Mo.
_____	\$ _____
_____	\$ _____

8. Interest in real estate?  Yes  No [if yes, describe below.]

Address Of Real Estate
_____
_____

9. Income from any other source?  Yes  No [if yes, describe below.]

_____
_____

10. Other assets?  Yes  No [if yes, describe below.]

_____
_____

\_\_\_\_\_  
Applicant's Signature