

## Rules of Outagamie County Circuit Court Regarding Guardians

Beginning January 1, 2012 the following procedures/rules are adopted for all Guardians appointed or currently acting in Outagamie County:

1. The proposed guardian of the estate shall obtain and file with the Court a full Credit History Report prior to appointment as guardian of the estate and thereafter every four (4) years file with the Annual Account a full updated Credit Report.
2. All guardians of the estate appointed prior to January 1, 2012 shall obtain and file with the Court a full Credit History Report on/before July 31, 2018 and thereafter every four (4) years file with the Annual Account a full updated Credit Report.
3. A proposed Guardian shall obtain and file with the Court prior to appointment as guardian a Wisconsin Department of Justice Criminal History Check and a Caregiver Background Check.
4. The Guardian of the estate shall provide completed itemized ledgers of all income and expenses for the entire year for their ward with the filing of the annual account. The guardian may use the sample available from the Register in Probate office or form otherwise approved by the Register in Probate.
5. The Guardian of the estate shall provide a copy of the bank statements and any financial statements for their ward for the entire year with the filing of the annual account.
6. The Guardian of the estate shall obtain Court approval for all large ticket item purchases over \$500.00 before making said purchase. This requirement shall not apply to customary daily and monthly living related expenses such as mortgage, rent, cost of care in a facility, utilities, medical, clothing and groceries. Failure to obtain approval may result in said purchase being denied and the purchase price required to be repaid by the guardian.
7. The proposed guardian of the estate of a minor or adult who will be residing with the guardian or a relative of the ward, or residing in any home/duplex/apartment owned by the guardian or a relative of the ward, shall provide a Monthly Expense Breakdown (form to be provided) within 30 days of appointment. Any existing guardian, at the request of the Register in Probate office, shall complete and file a Monthly Expense Breakdown form.
8. All requests for mileage reimbursement must be presented to the Court (Register in Probate office) pursuant to Wisconsin State Statutes and if approved will be at the Volunteer IRS rate of 14¢ per mile.

9. The guardian of the estate shall retain all income receipts, disbursement receipts, and financial statements.
10. Cases will be selected randomly each year and the guardian of the estate will be required to provide the Court with all disbursement receipts, and all cancelled checks for the year.
11. If an Order to Show Cause is issued to a guardian, the Court may impose a \$75.00 fine on said guardian.
12. If a second Order to Show Cause is issued to the same guardian, whether in the same year or a different year, the Court may impose a \$150.00 fine on said guardian.
13. If a third Order to Show Cause is issued, whether in the same year or a different year, the Court may impose a \$250.00 fine and the guardian may automatically be removed.

All the above policies and rules were updated revised and made as of effective January 1, 2018.

Approved:



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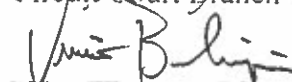
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