

IMPORTANT INFORMATION REGARDING “ANNUAL GUARDIAN REPORTS”

A party who files a confidential document under Rule 7 Confidential Documents and Information shall, when filing the paper document with the Clerk’s Office, place the original document in an envelope (do not seal the envelope, the Clerk will do it) that bears the case name and number, the name of the document being filed, the name of the party filing the document, and the phrase “Confidential Document.” A separate envelope shall be used for each confidential document. a confidential document shall not be maintained as part of the public record of a probate, guardian or conservator case.

If your Annual Guardianship Report or Conservatorship Report/Accounting includes any of the following, then you may want to file it as a confidential document:

1. Medical Reports and Records
2. Inventories and Appraisements
3. Accountings
4. Any other documentation that has a social security number, account or financial number, credit card, bank account, brokerage account, unless limited to last four digits only.
5. Insurance Policy
6. Annuity Contract