



**GUARDIAN OF THE PERSON
INCOME AND EXPENSE WORKSHEET**

(must be attached to Annual Report on Location, Condition and Well-Being of a Ward)

The form on the next page must be used as an attachment to an Annual Report when:

(1) there is no Guardian of the Estate

AND

(2) the Guardian of the Person is managing funds of the Ward pursuant to Court order *other than Social Security funds*.



GUARDIAN OF THE PERSON INCOME AND EXPENSE WORKSHEET

(must be attached to Annual Report on Location, Condition and Well-Being of a Ward)

CAUSE NUMBER			
WARD'S NAME			
GUARDIAN'S NAME			
REPORTED PERIOD (MM/DD/YYYY)	TO		
SAVINGS			
TOTAL SAVINGS ON HAND AT THE BEGINNING OF THE REPORTING PERIOD (including any Interest Earned)			\$
INCOME			
MONTH AND YEAR	INCOME SOURCE	ANNUAL INCOME RECEIVED (other than Social Security)	
TOTAL INCOME			\$
GROSS ASSETS (SAVINGS & INCOME) =			\$
EXPENDITURES			
MONTH AND YEAR	EXPENSES FOR FOOD AND HOUSING	EXPENSES FOR MEDICAL/DENTAL	EXPENSES FOR CLOTHING, PERSONAL ITEMS, RECREATION, MISCELLANEOUS
SUBTOTAL	\$	\$	\$
TOTAL EXPENDITURES			\$
NET ASSESTS (GROSS ASSETS – TOTAL EXPENDITURES) =			\$