

SUPREME COURT OF THE STATE OF NEW YORK  
COUNTY OF SUFFOLK

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In the Matter of the Initial Report of

\_\_\_\_\_

INITIAL REPORT

As Guardian for

\_\_\_\_\_

Index #

An Incapacitated person.

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I, \_\_\_\_\_, with an address at \_\_\_\_\_, as Guardian for the above-named person, do hereby make, render and file the following initial Report of Guardia as follows:

1. That your Guardian has successfully completed all educational requirements under Section 81.39 of the Mental Hygiene Law by attending class on the \_\_\_\_ day of \_\_\_\_\_, 20\_\_ sponsored by \_\_\_\_\_ at \_\_\_\_\_.  
(attach a copy of certificate issued to Guardian)
2. That your Guardian file with the Supreme Court his/her bond in the amount of \$\_\_\_\_\_ on \_\_\_\_\_, 20\_\_  
(attach a copy of bond)
3. That your Guardian received his/her commission from the County Clerk, which commission is dated \_\_\_\_\_, 20\_\_  
(attach a copy of commission).



5. The following is a true and full account of all assets of the Incapacitated Person that have been received by your Guardian and placed in guardianship accounts under the control of the Guardian:

**BANK ACCOUNTS**

(List name and address of institution, account numbers and amount of money on hand prior to liquidation by Guardian and the institution and account numbers to which the monies were deposited) Provide statements evidencing closeout of accounts

All monies have been deposited into guardianship accounts, except:  
(explain)

STOCKS AND SECURITIES

(List name and address of company, number of shares and fair market value of stock or security as of the date of your appointment)

REAL ESTATE

(List property address, description of property [i.e. two family dwelling] and approximate value of premises, and names of tenants, if any, as well as rental income collected. Set forth date of filing of Statement Identifying Real Property with County Clerk)

PERSONAL PROPERTY

(Set forth any jewelry, collectibles, automobiles and cash and set forth approximate values)

INCOME

(Set forth and identify all sources of income which the Incapacitated Person is entitled to receive; itemize all income actually received since the date of your appointment as Guardian to the date of this report)

DISBURSEMENTS

(Set forth all payments made from the date of your appointment as Guardian to the date of this report)

ASSETS NOT YET MARSHALLED

(Set forth all bank accounts, stocks, securities and/or security accounts not yet converted to guardianship assets)

