**GUARDIANSHIP and TRUST SCENARIOS**

**(Cheat Sheet)**

**This chart uses sample anniversary dates to show the basis for calculating the report dates. Actual due dates should be adjusted according to the month of appointment/action.**

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| --- | --- | --- |
| **Action** | **Sample Anniversary****Date** | **Sample Report****Due Date** |
| GDN of **estate** appointedGDN of **person** appointed | January 1990July 1998 | January 2007 |
| GDN of **estate** appointedDifferent GDN of **person** appointedGDN of **person resigns**/**estate** GDN appointed for **person** | January 1990January 1990May 1996 | January 2007 |
| **GDN** appointed**Trustee** appointed | January 1990September 1995 | January 2007 |
| **Trustee** appointed**GDN** appointed | January 1990June 1995 | January 2007 |
| GDN of **estate** appointedGDN of **person** appointedGDN of **person** **resigns**/new successor GDN of **person** appointed | January 1990July 1993October 1997 | January 2007 |
| GDN of **estate** appointedGDN of **person** appointed**Both** GDNs resigned/ new successor GDN appointed for person and estate | January 1990July 1993March 2000 | March 2007 |
| Co-GDNs of **Person/Estate** appointed 1 Co-GDN dies, other GDN becomes sole GDNSole GDN petitions for Co-GDNs/approved *(new* *co-gdn appointed)*Initial GDN resigns/Co-GDNs continue | January 1990June 2003August 2005October 2005 | January 2007 |
| Co-GDNs of **Person/Estate** appointed 1 Co-GDN dies, other GDN becomes sole GDNSole GDN petitions for Co-GDNs/approvedInitial GDN resigns,/Co-GDNs continue**Both** Co-GDNs resignNew successor GDN for **person/estate** apptd | January 1990June 2003August 2005October 2005April 2006April 2006 | January 2007April 2007 |

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| --- | --- | --- |
| Minor Settlement for 6 year old childTrust created for minor | Settlement Approved May 2006November 2006 | July 2018 (track for Order Disbursing Funds 2 months after 18th birthday)**New case number established under trust cause code**. Annual report due November 2007  |
| Minor Settlement for 8 year old childGDN for Person appointed | Settlement ApprovedSeptember 2005November 2005 | November 2015 (track for Order Disbursing Funds 2 months after 18th birthday)Periodic report due November of cycle |

**Added Scenarios:**

|  |  |  |
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| **GDN** appointed/Same person appointed as **Trustee****GDN** resigns/**Trustee** continues | January 1990September 1995 | January 2007 |
| **GDN** appointed/Same person appointed as **Trustee****GDN** resigns but continues as **Trustee/Successor GDN** appointed | January 1990September 1995 | January 2007 |
| **GDN** of **estate** appointed for MNR**GDN also** appointed as **Trustee** **MNR** reaches majority, co-GDN of **person** appointedGDN of **estate** resigns/GDN of **person** appointed GDN of **estate** | January 1990March 2000May 2007July 2007  | January 2007January 2008January 2008  |
| **GDN** appointed**Trustee** appointed**Guardianship Terminated/Trust** continues  | January 1990March 2005June 2006 | January 2007 |

Note: LR 98.20(c) (5) states that any changes to the reporting cycle of a guardian or trustee shall be approved by the court on a form provided by the Clerk’s Office. You can refer them to <http://www.kingcounty.gov/courts/scforms/guardianship.aspx> for the form.