**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** appointed  GDN of **person** appointed | January 1990  July 1998 | January 2007 |
| GDN of **estate** appointed  Different GDN of **person** appointed  GDN of **person resigns**/**estate** GDN appointed for **person** | January 1990  January 1990  May 1996 | January 2007 |
| **GDN** appointed  **Trustee** appointed | January 1990  September 1995 | January 2007 |
| **Trustee** appointed  **GDN** appointed | January 1990  June 1995 | January 2007 |
| GDN of **estate** appointed  GDN of **person** appointed  GDN of **person** **resigns**/new successor GDN of **person** appointed | January 1990  July 1993  October 1997 | January 2007 |
| GDN of **estate** appointed  GDN of **person** appointed  **Both** GDNs resigned/ new successor GDN appointed for person and estate | January 1990  July 1993  March 2000 | March 2007 |
| Co-GDNs of **Person/Estate** appointed  1 Co-GDN dies, other GDN becomes sole GDN  Sole GDN petitions for Co-GDNs/approved *(new* *co-gdn appointed)*  Initial GDN resigns/Co-GDNs continue | January 1990  June 2003  August 2005  October 2005 | January 2007 |
| Co-GDNs of **Person/Estate** appointed  1 Co-GDN dies, other GDN becomes sole GDN  Sole GDN petitions for Co-GDNs/approved  Initial GDN resigns,/Co-GDNs continue  **Both** Co-GDNs resign  New successor GDN for **person/estate** apptd | January 1990  June 2003  August 2005  October 2005  April 2006  April 2006 | January 2007  April 2007 |

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| Minor Settlement for 6 year old child  Trust created for minor | Settlement Approved May 2006  November 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 child  GDN for Person appointed | Settlement Approved  September 2005  November 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 1990  September 1995 | January 2007 |
| **GDN** appointed/Same person appointed as **Trustee**  **GDN** resigns but continues as **Trustee/Successor GDN** appointed | January 1990  September 1995 | January 2007 |
| **GDN** of **estate** appointed for MNR  **GDN also** appointed as **Trustee**  **MNR** reaches majority, co-GDN of **person** appointed  GDN of **estate** resigns/GDN of **person** appointed GDN of **estate** | January 1990  March 2000  May 2007  July 2007 | January 2007  January 2008  January 2008 |
| **GDN** appointed  **Trustee** appointed  **Guardianship Terminated/Trust** continues | January 1990  March 2005  June 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.