

**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.

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

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 18 th 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 18 th birthday) Periodic report due November of cycle

Added Scenarios:

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