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**EFFECTIVE JULY 1, 2017
 LEGISLATIVE CHANGES**

HB 399 Guardianship

Section 2. Subsection (1) of section 744.367, Florida Statutes, Duty to file annual guardianship report.-

- (1) Unless the court requires filing on a calendar-year basis, each guardian of the person shall file with the court an annual guardianship plan **within 90 days** after the last day of the anniversary month that the letters of guardianship were signed, and the plan must cover the coming fiscal year, ending on the last day in such anniversary month. Calendar year filings must be filed on or before April 1 of each year.

SCHEDULE for ANNUAL PLANS & ACCOUNTINGS							
Legislative Changes Effective July 1, 2017							
LETTERS SIGNED	REPORT BEGIN DATE	REPORT END DATE	PLAN DUE "OLD"	PLAN/ACCT. DUE "NEW"	FILED WITHIN	PHYSICIAN EXAM REPORT	MINOR'S PHYSICIAN EXAM
JANUARY	Feb 1st	Jan 31st	Dec 1st	May 1st	Feb 1st-Apr 30th	Nov 1st-Jan31st	Aug 1st-Jan 31st
FEBRUARY	Mar 1st	Feb 28th	Jan 1st	Jun 1st	Mar 1st-May 31st	Dec 1st-Feb 28th	Sept 1st-Feb 28th
MARCH	Apr 1st	Mar 31st	Feb 1st	Jul 1st	Apr 1st-Jun 30th	Jan 1st-Mar 31st	Oct 1st-Mar 31st
APRIL	May 1st	Apr 30th	Mar 1st	Aug 1st	May 1st-Jul 31st	Feb 1st-Apr 30th	Nov 1st-Apr 30th
MAY	Jun 1st	May 31st	Apr 1st	Sept 1st	Jun 1st-Aug 31st	Mar 1st-May 31st	Dec 1st-May 31st
JUNE	Jul 1st	Jun 30th	May 1st	Oct 1st	Jul 1st-Sept 30th	Apr 1st-Jun 30th	Jan 1st-Jun 30th
JULY	Aug 1st	Jul 31st	Jun 1st	Nov 1st	Aug 1st-Oct 31st	May 1st-Jul 31st	Feb 1st-Jul 31st
AUGUST	Sept 1st	Aug 31st	Jul 1st	Dec 1st	Sept 1st-Nov 30th	Jun 1st-Aug 31st	Mar 1st-Aug 31st
SEPTEMBER	Oct 1st	Sept 30th	Aug 1st	Jan 1st	Oct 1st-Dec 31st	Jul 1st-Sept. 30th	Apr 1st-Sept 30th
OCTOBER	Nov 1st	Oct 31st	Sept 1st	Feb 1st	Nov 1st-Jan 31st	Aug 1st-Oct 31st	May 1st-Oct 31st
NOVEMBER	Dec 1st	Nov 30th	Oct 1st	Mar 1st	Dec 1st-Feb 28th	Sept 1st-Nov 30th	Jun 1st-Nov 30th
DECEMBER	Jan 1st	Dec 31st	Nov 1st	Apr 1st	Jan 1st-Mar 31st	Oct 1st-Dec 31st	Jul 1st-Dec 31st

Letters Signed- (GID) Guardianship Inception Date

Report Begin Date- Regular Reporting Period Begins

Report End Date- Regular Reporting Period Ends

Plan Due- Plan due **within 90 days after the last day of anniversary month of the GID**

Annual Acct. Due- Annual Accounting due **within 90 days after the last day of anniversary month**

Physician Exam Report- Physician must examine the ward no more than 90 days before the beginning of the period

Minor's Physician Exam- Physician must examine the minor ward no more than **180 days** before the beginning of the period

***Must have school progress report also.**

Initial Plan and Inventory-Due within 60 days of GID Letters

Assets Found Not Reported on Inventory- Must report within 30 days

Safe Deposit Box Inventory- Due within 10 days of opening

Internal Audit has 30 days to recommend Approval or Denial of Plans & 90 days to recommend Approval or Denial of Accountings from the date they were filed