Register in Chancery Register in Chancery Register in Chancery Kent County New Castle County Sussex County 38 The Green, Ste. 208 500 N. King St., Ste. 11600 34 The Circle

Dover, DE 19901 Wilmington, DE 19801 Georgetown, DE 19947

302-735-1930 302-255-0544 302-856-5777

Procedures for filing a Petition for the Appointment of Guardian(s) of the Person and Property of a Person with an Alleged Disability

- The petition must be filled out completely.
 - o The court clerk cannot complete the petition for you.
 - The petitioner(s) will need to have their signature(s) notarized on several forms. If you appear in the Register's Office with identification and the correct paperwork, your signature(s) can be notarized by a court clerk in the Register's Office.
 - O A detailed physician's affidavit must be attached to the petition and is required to be notarized. The person with an alleged disability must have been seen by the physician within the last three (3) months.
- The filing fee for the petition is \$135.00 plus \$2.00 per page scanning fee. Payment must be received at the time of filing or the petition will not be accepted by our office. We accept cash, check or money order (made payable to the "Register in Chancery"). If the Register in Chancery's office makes photocopies for you, we will charge a \$1.50 per page fee.
- The Court will appoint an attorney to represent the best interests of the person with an alleged disability. The attorney does not represent the petitioner(s). The Court will award the attorney *ad litem* a reasonable fee for his/her work on behalf of the person with an alleged disability. The petitioner is responsible for paying the attorney's fee although the Judicial Officer may order the fee be paid from the funds of the person with an alleged disability. For uncontested matters, the fee can be up to \$750.00. Extraordinary cases such as contested petitions, those that require out of state travel or further investigation may exceed \$750.00.
- The petitioner(s) is/are responsible for obtaining consents from the interested parties or sending notice of the petition to the interested parties. Please see the instruction sheet within this packet for additional information.
- A petition for guardianship should only be filed as a last resort. Information can be found online on the following alternatives:
- Advance Health Care Directive https://www.dhss.delaware.gov/dsaapd/advance1.html
- Durable Power of Attorney https://www.dhss.delaware.gov/dhss/dhcq/poa.html
- Surrogate Decision Making https://delcode.delaware.gov/title16/c025/index.shtml
- Supported Decision Making https://www.dhss.delaware.gov/dhss/dsaapd/supported_decision_making.html

Form CM1 Rev. 10/2023

Register in Chancery 38 The Green, Ste. 208 Dover, DE 19901 302-735-1930 Register in Chancery 500 N. King St., Ste. 11600 Wilmington, DE 19801 302-255-0544 Register in Chancery 34 The Circle Georgetown, DE 19947 302-856-5775

Guardianship Monitoring Program

The Court of Chancery utilizes the Guardianship Monitoring Program to monitor individuals who have been placed under guardianship and whose care is the responsibility of court-appointed guardians. This important monitoring function is coordinated by the Guardianship Advocacy Director of the Office of the Public Guardian and Court of Chancery under Chancery Rule 180-D and enables the Court to receive first-hand information about people for whom the Court has ultimate responsibility. A Guardianship Analyst is assigned a case, given necessary information about the case, and makes an appointment to meet with the guardian and person with a disability. This meeting will likely be virtual or could be face to face. After the meeting, the Guardianship Analyst fills out a report indicating the status of the person with a disability and may make recommendations for action. The Analyst's confidential report is filed by the Office of the Public Guardian and subsequently viewed by Court staff to determine if further action is necessary. The Guardianship Analyst, as well as the Guardianship Monitoring Program itself, is an extension of the Court of Chancery and the Office of the Public Guardian and should be treated accordingly.

Persons subject to guardianship are very important and they deserve every right and protection available. You should expect to be contacted in the future by the Guardianship Monitoring Program and your cooperation with scheduling meeting times in a timely fashion is greatly appreciated. Thank you in advance for your time and effort.

Sincerely, Sherri Hageman, M.S., Guardianship Advocacy Director Office of the Public Guardian (302) 255-1901 or (302) 358-0782

IN	THE MATTER OF:		
	: , : C.M. #		
A	person with an alleged disability :		
	PETITION TO APPOINT GUARDIAN(S) OF THE		
	PERSON AND PROPERTY		
1.	Information about the person(s) who wish(es) to be appointed guardian(s):		
a.	Name(s):		
	Current address(es):		
c.	Telephone Number(s):		
d.	Relationship(s) to person with an alleged disability:		
e.	. Do you require an interpreter? \square Yes \square No. If yes, what language?		
2.	Information about the person with an alleged disability:		
a.	Age:		
b.	Date of birth:		
c.	Current address:		
d.	Permanent address:		
e.	Is the person with an alleged disability a patient at a hospital, living in an		
	institution or living in a group home?		
	□ No		
	☐ Yes. If "Yes", answer the following questions:		

	i. Name of facility:
	ii. Admission date:
	iii. Reason(s) for admission:
f.	Does the person with an alleged disability require an interpreter?
	☐ Yes ☐ No. If yes, what language?
3.	Interested parties
a.	Has the person with an alleged disability ever appointed an Agent through a
	Power of Attorney or Advance Health Care Directive?
	\square No
	☐ Yes. If "Yes", name, address and phone number of the Agent:
b.	Has the person with an alleged disability been represented by a Delaware attorney within the last two years? □ No
	\square Yes. If "Yes", include the name of the attorney, explain the reason and
incl	ude the years of service:
c.	Has someone been primarily responsible in the past six (6) months for
	providing care or handling the finances for the person with an alleged disability?
	\square No
	☐ Yes. If "Yes", provide their name, address and phone number:

d. The names and contact information of the next of kin, including anyone who would be entitled to inherit through the estate of the person with a disability if that person died without a will, a named fiduciary, executor or beneficiary. If an interested party is a minor, please provide the name and contact information for the minor's parent or other guardian as the parent or guardian will require notice.

Name of interested party	Relationship to person with an alleged disability	Address and phone number of interested party	Age

Please attach a separate sheet of paper if additional space is needed

4.	Who is pa	aying the expenses	of the person with an	alleged disability and out
of what	t funds?			
5.	The marital status of the person with an alleged disability is: (check one)			
\square S	Single	\square Married	\square Divorced	\square Widowed
6.	6. Has the person with an alleged disability ever executed a Will?			cuted a Will?
	\square No			
	☐ Yes. I	f "Yes", the Will i	s located at the follow	ing address:
				and is in the custody
of th	ne following	nerson/entity:		

7.	Has the person with an alleged disability ever been a member of the	
military	? □ Yes □ No	
8.	Are you aware of any reports made to, or investigations by, Adult Protective	
Services regarding you or the person with an alleged disability?		
	□ No	
	☐ Yes. If "Yes", please provide an explanation:	
9.	Are there areas of decision-making that you think the person with an alleged	
disabilit	y can continue to make? ☐ Yes ☐ No	
If "Y	es", please explain what areas:	
10.	Explain in detail why the person with an alleged disability is in need of a	
guardiar	1	
Dlagge o	ttook a semantic sheet of manon if additional space is needed	
11.	ttach a separate sheet of paper if additional space is needed. Explain in detail why you should be appointed guardian(s).	
	Explain in detail why you should be appointed guardian(s).	
Please a	ttach a separate sheet of paper if additional space is needed.	

12. List <u>ALL</u> of the assets of the person with an alleged disability (attach additional pages if necessary)

Property	Estimated Value	Retail Value	If jointly owned, name and address of co-owner
Cash			
Bank Accounts			
Stocks/Bonds			
Mutual Funds			
Securities/Options			
Annuities			
Home/Residence			
Other real estate			
Motor vehicles			
Business			
Other valuable property (except ordinary household furnishings and clothes)			
Life Insurance Policy Other:			
Other:			

13. List ALL of the current sources of income for the person with an alleged disability (attach additional pages if necessary)

Benefit or source of income	Amount	When received (e.g. monthly/ quarterly)
Business (professional/self-employment)		
Payments received for rental property		
Interest		
Dividends from stocks or bonds		
Pension		
Social Security*		
VA Benefits*		
Disability		
IRA/401K/Annuity payments		
Gifts		
Other:		

^{*}Who is the representative payee for these benefits? _____

14. List <u>ALL</u> of the debts and monthly expenses for the person with an alleged disability, including any debts incurred for care of legal dependents (attach additional pages if necessary)

Description of debts and monthly expenses/bills	Total debt	Monthly payment
Mortgage (including taxes, insurance and escrow)		
Rent		
Water		
Sewer		

Description of debts	Total debt	Monthly
and monthly expenses/bills Electric/Gas		payment
Oil		
Trash		
Television		
Telephone		
Groceries		
Household maintenance and repairs (list)		
Item:		
Item:		
Clothing		
Health insurance		
Medication		
Dental/Out of pocket medical expenses		
Laundry/dry cleaning		
Cosmetics/toiletries		
Hobbies/Entertainment		
Barber/Hairdresser		
Newspaper/magazine subscription(s)		
Child support		
Charitable and/or religious donations		
Vacation		
Public Transportation		
Automobile: Monthly payment		
Repairs and maintenance		
Insurance		
Gasoline		
Life insurance payment		

1	15.	All the following statements must be true before the Court of Chancery will
cons	side	er this petition. Check the following statements to acknowledge they are true:
	a.	☐ There is currently no guardian for the person or property of the person with
		an alleged disability.
	b.	☐ The person with an alleged disability is unable to properly manage and
		care for his/her person and, as a consequence therefore, is in danger of
		becoming the victim of a designing person. He/she is in danger of
		substantially endangering his/her own health or becoming subject to abuse by
		other persons.
	c.	☐ The person with an alleged disability is unable to properly manage and care
		for his/her property and, as a consequence therefore, is in danger of
		dissipating or losing such property by becoming the victim of designing
		person(s).
	d.	☐ The person with an alleged disability has lived in the State of Delaware for
		at least the last six (6) months.
	e.	☐ Attached is the notarized physician's affidavit.
	f.	□ I/We consent to the Register in Chancery of the Court being my/our agent
		for acceptance of service as to any claim arising out of the guardianship if, by
		reason of the guardian's(s') absence(s) from this State, I/We cannot be
		personally served.
	g.	☐I/We understand the Court may require a guardianship bank account to be
		opened and for all of the income and assets to be deposited into the
		guardianship bank account. I/We wish to establish the guardianship bank
		account at this Delaware bank,
	h.	\Box I/We understand the following about the court appointed attorney <i>ad litem</i> :
		(1) the Court will appoint an attorney to represent the best interests of the

person with an alleged disability; (2) the Court will award the attorney *ad litem* a reasonable fee for his/her work on behalf of the person with an alleged disability; (3) I/We as the petitioner(s) am/are responsible for paying the attorney's fee although the Judicial Officer may order the fee be paid from the funds of the person with an alleged disability; and (4) for uncontested matters, the fee can be up to \$750.00 and for extraordinary cases such as contested petitions, those that require out of state travel or further investigation, the fee may exceed \$750.00.

WHEREFORE, Petitioner(s) respectfully request that:

- 1. This Court appoint him/her/them as guardian(s) of the person and property of the person with an alleged disability.
- 2. A preliminary order be entered to appoint an attorney *ad litem*, schedule a hearing and to notify interested parties.

Address	Address
Phone number	Phone number
STATE OF	:
COUNTY OF	:
This instrument was acknowledged before	me on this day of
, 20 by	[Name of affiant]

PHYSICIAN'S AFFIDAVIT

NOTE: This affidavit will be used in a legal proceeding to appoint a guardian for the patient named below. Detailed information is necessary for the court to assess whether the patient has a disability under Delaware law. A person with a disability is defined under Delaware law as someone who "[b]y reason of mental or physical incapacity is unable properly to manage or care for their own person or property, or both, and, in consequence thereof, is in danger of dissipating or losing such property or of becoming the victim of designing persons or, in the case where a guardian of the person is sought, such person is in danger of substantially endangering person's own health, or of becoming subject to abuse by other persons or of becoming the victim of designing persons[.]" 12 Del. C. § 3901(a)(2). The information in this affidavit must be specific and detailed and based on your personal examination of the patient. Sample forms are available on the court's website at https://courts.delaware.gov/forms/. Thank you for your concern and cooperation.

IS THIS AN EMERGENCY GUARDIANSHIP PETITION? If an *emergency* appointment of guardian is needed, please complete page four (4) of this form *in addition* to pages one (1) through three (3).

PATIENT'S NAME:	
ADDRESS:	
DATE OF BIRTH:	
I, of full age, hereby certify as follows:	, (check one) \square M.D., \square D.O., \square Ph.D., \square Psy.D.
I am duly licensed and accredite	ed in the following areas of medical practice:
The history of my involvement with this and add further clarification on the blan	,
	years □ Less than 1 year □ First visit
The patient's diagnoses/conditions relat	ted to their incapacity include:
2	\square Mild \square Moderate \square Severe \square N/A
3.	☐ Mild ☐ Moderate ☐ Severe ☐ N/A

Patient Name:
I personally examined this patient on, 20
The examination lasted approximately
(Time) Relevant tests and results related to their incapacity:
Does the patient have difficulty communicating? If so, describe the difficulty in detail, and provide the cause of the patient's difficulty with communication:
Based on tests and my examination of this patient, it is my professional opinion that she/he:
\square does not have
\square does have
a disability that significantly interferes with the ability to make responsible decision regarding health care, food, clothing, shelter, or finances.
Optional) The following documents are attached as supporting information regarding the particulars of the disability:
Describe the patient's disability:
The disability impairs the patient's ability to perform the following functions and activities:
In my opinion, the patient
\square does have
\square does not have
sufficient mental capacity to understand the nature of guardianship in order to consent to the appointment of a guardian.

The patient is of is not uble to perform the follows	ing functions inde	pendently:
Activities of daily living	☐ Is able	☐ Is not able
Pay his/her own bills	\Box Is able	\Box Is not able
Live alone	\Box Is able	\Box Is not able
Take medication appropriately	\square Is able	\Box Is not able
Give informed consent for medical procedures	\Box Is able	\Box Is not able
Resist scams	\Box Is able	\Box Is not able
that the contents of this affidavit are true.		
Date Physician's Signature		an's Signature
	Printed	Name
Physician's Address:		
Physician's Phone Number:		
Physician's Phone Number::		
Physician's Phone Number:: STATE OF: COUNTY OF:		
Physician's Phone Number::	this day of	
Physician's Phone Number:	this day of	
Physician's Phone Number:	this day of	

Patient Name:	_
TO BE COMPLETED WHEN REQUESTING AN E	EMERGENCY GUARDIANSHIP
Nature of the emergency, such as medical, abuse, neglect	et, exploitation, etc.:
If this is a medical emergency, provide the diagnosis:	
Describe the testing or treatment related to the diagnosis accomplished without imposition of a guardianship and next 72 hours:	l why it is urgently needed within the
Do you recommend a change in the code status at this tin Do you recommend withdrawal of treatment at this time	
If you responded "Yes" to either of the above, please res	pond to the following:
What is the current code in the patient's file? \Box Full	code □ DNR □ Other
Is there a living will in the patient's file?	☐ Yes ☐ No
If yes, please attach a copy. Have you spoken with the patient about their end of life If "Yes", what are their wishes and how you kno	
	DI C C A
Date	Physician's Signature
STATE OF:	Printed Name
COUNTY OF:	
This instrument was acknowledged before me on this	day of, 20 by
[Name of affiant].	
${Not}$	ary Public

COURT OF CHANCERY PERSONAL INFORMATION SHEET

complete a separate form and use se	eparate contacts on page two of this form
Social Security Number:	Date of Birth:
Date this form is completed:	
appointed as guardian of the person understand that I must complete the be denied. In order to provide the Co qualification to serve as guardian ar	er, I have applied to the Court of Chancery to be with an alleged disability/minor named above. is form in full or my guardianship petition may ourt with sufficient information to determine mynd to assist the Court in assuring that the Court's te and make contact with me, the following
Proposed Guardian's current full na	ime:
Proposed Guardian's physical addre	ess:
Proposed Guardian's mailing addre	ss (if different):
Home phone number:	Work phone number:
Cell phone number:	E-mail address:
Date of birth: So	ocial Security number:
Driver's License number and State:	
Place of employment and address: _	
Name of supervisor and telephone i	number:
Name/Address/Telephone number of	of spouse (if not a co-petitioner/co-guardian):

Contacts : List the information for two people who should always be able to locate	te
or contact you and do not live at the same address as each other or the petitioner(s	s)
If there is more than one proposed guardian, separate contacts must be listed.	

1.	Name:	
	Address:	
		_ Relationship:
2.	Name:	
	Address:	
	Phone number:	_ Relationship:
name attorn locati gover public where eleas perso all lia	ng or contacting me in the future. I all ment or public databases to locate not, or private agency with information eabouts of the person with an alleged se that information to the Court and it	of the persons named above and my ormation which might assist the Court in Iso authorize the court staff to search me. I further agree that any federal, state about my whereabouts, or the disability or minor named above, may as staff, and I authorize and direct such see the Court and the Court's staff from mine my whereabouts or the
Propo	osed Guardian's signature	
STAT	ГЕ OF	:
COU	NTY OF	:
This i	instrument was acknowledged before	me on this day of
	, 20 by	[Name of affiant].
		Notary Public/Chancery Court Clerk
		Tiotaly I dolle, Challedly Court Clerk

A	person with an alleged disability/Minor:	
	AFFIDAVIT OF PROPOSED GUARDIAN'S HISTORY ease Note: If there is more than one proposed guardian, each person will need to mplete a separate form.	
Pr	oposed Guardian's Name:	
1.	Have you ever declared bankruptcy? ☐ Yes ☐ No If so, when? If so, what type?	
2.	Have you ever been convicted of a misdemeanor? □Yes □No	
	If so, describe which misdemeanor, when and in what jurisdiction you were convicted (e.g. State, County and Police Department).	
3.	3. Have you ever been convicted of a felony? □Yes □No If so, describe which felony, when and in what jurisdiction you were convicted (<i>e.g.</i> State, County and Police Department)	
4.	I give the State of Delaware permission to conduct a criminal background check on me at any time during the consideration of my petition for guardianship and, if granted, at any time during the period I am guardian. I solemnly swear and affirm under penalty of law that the statements and answers above are true to the best of my knowledge.	
ST	TATE OF :	
C	OUNTY OF:	
Th	nis instrument was acknowledged before me on this day of	
	, 20 by[Name of affiant].	
_ No	otary Public/Chancery Court Clerk Proposed guardian's signature	

INSTRUCTIONS FOR NOTIFYING INTERESTED PARTY(IES) OF PETITION FOR GUARDIANSHIP

It is the petitioner's(s') responsibility to notify the interested party(ies) when a petition for guardianship is filed with the Court. This includes notifying all of the parties you listed on number three (3) of the guardianship petition.

Each interested party may sign and have notarized a copy of the attached "Waiver of Notice and Consent." The petitioner(s) will be required to send notice to anyone who does not sign a consent. Additional information will be provided to the petitioner(s) after the order is signed appointing the attorney for the person with an alleged disability and scheduling the hearing.

If you do not know the address for an interested party, you must make every attempt to locate the address and file the enclosed affidavit of efforts to locate address of interested party with your petition.

In the matter of:	:
,	: : C.M. #:
A person with an alleged disability	:
WAIVER OF NOT	ICE AND CONSENT
I,	, whose relationship to the
person with an alleged disability is that of	of
(e.g. mother, brother), hereby waive my	right to notice of the hearing and hereby
consent to the appointment of	as guardian(s) of
the (check all that apply) □ person	n (to make his/her medical decision)
and/or □property (to make his/her finan	cial decisions) without further notice.
Interested Party's signature	
Address:	
Phone Number:	
STATE OF	_ :
COUNTY OF	:
This instrument was acknowledged before	re me on this day of
, 20 by	[Name of affiant].
	Notary Public/Chancery Court Clerk

IN THE MATTER OF:	:	
A person with an alleged disability,	: : C.M. #	
	FFORTS TO LOCATE TERESTED PARTY	
I/We,	, petitioner(s) in the above	
matter, hereby confirm that I/We have b	een unable, after exercising reasonable	
diligence, to locate an address for interest	sted party,	
[Name of interested party or missing per	rson], in order to provide that interested	
party with notice of the filing of the gua	rdianship petition.	
My/Our last contact with	[Name of	
interested party or missing person] was on or around		
[month/year] and to the best of my/our k	knowledge, the last contact he/she had with	
the person with an alleged disability was	s on or around	
[month/year].		
My/Our efforts have included the	following [please check all that apply]:	
☐ performing an internet search	for the address of the interested party;	
\square asking other interested parties	if they know of the missing person's	
current whereabouts;		
☐ messaging the missing person	through electronic means:	

☐ Other:	
If I/We subsequently locate the mi	ssing interested party, I/We will notify the
Court of his/her address.	
Petitioner	Co-Petitioner
returner	Co i chilonei
STATE OF	_ :
COUNTY OF	:
This instrument was acknowledged befor	re me on this day of
_	[Name of affiant].
, 20 by	[Name of affiant].
	Notary Public/Changery Court Clark
Pursuant to Court of Chancery Rule 178	Notary Public/Chancery Court Clerk <i>B, the use of an Unsworn Declaration (se</i>
below) is permitted rather than the notar	
Petitioner	Co-Petitioner (if applicable)
I declare under penalty of perjury	I declare under penalty of perjury
under the laws of Delaware that the	under the laws of Delaware that the
foregoing is true and correct.	foregoing is true and correct.
Executed on the day of	Executed on the day of
(month) (year).	(month) (year).
· · · · · · · · · · · · · · · · · · ·	, , , , , , , , , , , , , , , , , , , ,
(Datitionar's Drinted Name)	(Co Potitionar's Printed Name)
(Petitioner's Printed Name)	(Co-Petitioner's Printed Name)
(Petitioner's Signature)	(Co-Petitioner's Signature)