

GUARDIAN AD LITEM REPORT

IN THE MATTER OF:

an alleged incapacitated individual.

The undersigned court-appointed Guardian *ad Litem* in this guardianship and/or protective proceeding submits the following report concerning the investigation which was conducted pursuant to S.C. Code Ann. § 62-5-106.

DURING MY INVESTIGATION, I INTERVIEWED THE FOLLOWING INDIVIDUALS:

	NAME OF PERSON INTERVIEWED:	DATE OF INTERVIEW:	METHOD OF INTERVIEW (e.g. in person, by phone):
1.	_____	_____	_____
2.	_____	_____	_____
3.	_____	_____	_____

DURING MY INVESTIGATION, I REVIEWED THE FOLLOWING DOCUMENTS:

	TYPE OF DOCUMENT:	PROVIDER OF THE DOCUMENT:
1.	_____	_____
2.	_____	_____
3.	_____	_____

I. REPORT ON ALLEGED INCAPACITATED INDIVIDUAL:

- Date and place of interview(s): _____
- Was the alleged incapacitated individual (A.I.I.) oriented to the time and place?
YES NO
- Describe the A.I.I.'s physical appearance: _____
- Who are the A.I.I.'s closest family members? _____
- Does the A.I.I. have a primary care physician or other treating medical provider?
NO YES If yes, list the doctor's name, address, and phone number.
- Does the A.I.I. have an attorney? NO YES
If yes, list the attorney's name, address, and phone number.
- Please list any known medical diagnoses of the A.I.I.

8. What are the current care and treatment needs of the A.I.I.?
9. What are the future care and treatment needs of the A.I.I.?
10. The A.I.I. has been rated or found to be: *(Check all that apply)*
Disabled;
Mentally ill or incompetent;
Chemically Dependent; or
None of the above.
11. The A.I.I. would benefit from: *(Check all that apply)*
Further education;
Further training;
Therapy or treatment;
Medical aids or equipment;
An operation or medical procedure(s);
Structural living arrangements;
Psychiatric treatment; or
None of the above.
12. Pursuant to S.C. Code Ann. § 62-5-304A(A) and § 62-5-407, as Guardian *ad Litem*, I believe that the A.I.I. should retain the following rights and powers:
(Check the rights and powers you recommend the A.I.I. should retain.)
- a. Marry or divorce;
 - b. Reside in a place of the A.I.I.'s choosing, and consent or withhold consent to any residential or custodial placement;
 - c. Travel without the consent of a guardian;
 - d. Give, withhold, or withdraw consent and make other informed decisions relative to medical, mental, or physical examinations, care, treatment, and therapies;
 - e. Make end-of-life decisions including, but not limited to, a "do not resuscitate" order or the application of any medical procedures intended solely to sustain life and consent or withhold consent to artificial nutrition and hydration;
 - f. Consent or refuse to consent to hospitalization and discharge or transfer to a residential setting, group home, or other facility for additional care and treatment;
 - g. Authorize disclosure of confidential information;
 - h. Operate a vehicle;
 - i. Vote;
 - j. Be employed without the consent of a guardian;
 - k. Consent to or refuse educational services;
 - l. Participate in social, religious, or political activities;

- m. Buy, sell, or transfer real or personal property or transact business of any type including, but not limited to, those powers conferred upon a conservator under S.C. Code Ann. § 62-5-422;
- n. Make, modify, or terminate contracts;
- o. Bring or defend any action at law or equity; and
- p. Other: _____

If necessary, please explain these recommendations. If additional space is needed, please use additional sheets and attach.

13. Is the A.I.I. capable of communicating, with or without reasonable accommodations, his or her wishes, interests, or preferences regarding the appointment of a guardian and conservator?

YES NO If no, then proceed to **Section II.**

14. Does the A.I.I. think he or she needs help caring for himself or herself?

NO YES If yes, in what areas?

15. Does the A.I.I. think he or she needs help (i) managing his or her property or financial affairs, (ii) providing for his or her support, or (iii) providing support for his or her legal dependents?

NO YES If yes, in what areas?

16. If a Petition for guardianship is pending, how does the A.I.I. feel about the proposed guardianship and the proposed guardian?

17. If a Petition for conservatorship is pending, how does the A.I.I. feel about the proposed conservatorship and the proposed conservator?

II. REPORT ON THE PROPOSED GUARDIAN:

*(If there is not a Petition for Appointment of Guardian pending, proceed to **Section III.**)*

18. Name of the proposed guardian: _____

19. Relationship of the proposed guardian to the A.I.I.: _____

20. Is the proposed guardian currently a primary caretaker for the A.I.I.?

YES NO If no, who is? _____

21. What are the proposed guardian's long-term plans for the A.I.I.?

22. Upon review of the proposed guardian's criminal background check, do you have any concerns regarding the ability of the proposed guardian to serve in this role?

NO YES If yes, please explain your concerns.

23. Has DSS ever investigated the proposed guardian?

NO YES If yes, please explain the circumstances and provide any information the DSS record revealed that you believe the Court should know.

24. Did your investigation of the proposed guardian reveal anything that you believe the Court should know?

NO YES If yes, please explain.

25. Do you believe the proposed guardian is an appropriate person to serve as a guardian for the A.I.I. considering (i) his or her geographic location, (ii) his or her familial or other relationship, (iii) his or her ability to carry out the duties of the guardianship, (iv) his or her potential conflict of interests, (v) the wishes of the A.I.I., and (vi) the recommendations of the relatives of the A.I.I.? Provide a detailed response.

26. Did your investigation reveal any other person who should be considered to be appointed the guardian in this matter?

NO YES If yes, please explain, including the name, address, telephone number, age, and relationship to the A.I.I.

III. REPORT ON THE PROPOSED CONSERVATOR

*(If there is not a Petition for Appointment of Conservator pending, proceed to **Section IV.**)*

27. Name of the proposed conservator: _____

28. Relationship of the proposed conservator to the A.I.I.: _____

29. Is the proposed conservator currently the primary person assisting the A.I.I. with his or her finances?

YES NO If no, who is?

30. What assets does the A.I.I. own or income does the A.I.I. receive that necessitates the need for a conservator?

31. Upon review of the proposed conservator's criminal background check, do you have any concerns regarding the ability of the proposed conservator to serve in this role?

NO YES If yes, please explain your concerns.

32. Has DSS ever investigated the proposed conservator?
NO YES If yes, please explain the circumstances and provide any information the DSS record revealed that you believe the Court should know.
33. Upon review of the proposed conservator's credit report, do you have any concerns regarding the ability of the proposed conservator to serve in this role?
NO YES If yes, please explain your concerns.
34. Did your investigation of the proposed conservator reveal anything that you believe the Court should know?
NO YES If yes, please explain.
35. Do you believe the proposed conservator is an appropriate person to serve as a conservator for the A.I.I. considering (i) his or her geographic location, (ii) his or her familial or other relationship, (iii) his or her ability to carry out the duties of the conservatorship, (iv) his or her potential conflict of interests, (v) the wishes of the A.I.I., and (vi) the recommendations of the relatives of the A.I.I.? Provide a detailed response.
36. Did your investigation reveal any other person who should be considered to be appointed the conservator in this matter?
NO YES If yes, please explain, including the name, address, telephone number, age, and relationship to the A.I.I.

IV. REPORT ON THE CONDITIONS OF PRESENT PLACE OF RESIDENCE AND FUTURE RESIDENCE

37. Date and time visited: _____
38. Address (including street, city, county, state, zip):

39. Type of abode: _____

40. Condition:

a. Exterior:

b. Utilities working:

c. Interior:

d. Cleanliness:

e. Fire hazards:

f. Other (explain):

41. Is there a proposed change in the residential plan for the A.I.I.?

NO YES If yes, please explain the plan and whether you believe the plan is in the best interest of the A.I.I.

V. CONCLUSIONS AND ADDITIONAL COMMENTS

42. Do you believe the A.I.I. is an incapacitated person pursuant to S.C. Code Ann. § 62-5-101(13)?

YES NO

43. Do you believe the A.I.I. needs a guardian?

YES NO

44. Do you believe there is a less restrictive alternative to the guardianship or limitations that should be placed on a guardian?

NO YES If yes, please explain.

45. Pursuant S.C. Code Ann. § 62-5-304A(B), as Guardian *ad Litem*, I believe that a guardian's rights and powers shall include, but not be limited to:

(Check the rights and powers you recommend be vested with a guardian.)

- a. Determine the place where the ward shall reside and consent or withhold consent to any residential or custodial placement;
- b. Consent to travel;
- c. Consent or refuse to consent to visitation with family, friends, and others;
- d. Give, withhold, or withdraw consent and make other informed decisions relative to medical, mental, or physical examinations, care, treatment, and therapies.

- e. Make end-of-life decisions including, but not limited to, a “do not resuscitate” order or the application of any medical procedures intended solely to sustain life and consent or withhold consent to artificial nutrition and hydration;
- f. Consent or refuse to consent to hospitalization and discharge or transfer to a residential setting, group home, or other facility for additional care and treatment;
- g. Authorize disclosure of confidential information;
- h. Consent to employment;
- i. Make, modify, or terminate contracts related to the duties of the Guardian;
- j. Consent to or refuse educational services; and
- k. Bring or defend any action at law or equity.

If necessary, please explain these recommendations. If additional space is needed, please use additional sheets and attach.

46. Do you believe the A.I.I. needs a conservator?

YES NO

47. Do you believe there is a less restrictive alternative to the conservatorship or limitations that should be placed on a conservator?

NO YES If yes, please explain.

48. Prior to your appointment, did you know the A.I.I.?

NO YES If yes, please explain.

49. Prior to your appointment, did you know the person(s) seeking appointment as guardian and/or conservator?

NO YES If yes, please explain.

50. Prior to your appointment, did you or do you now have a personal interest in these proceedings?

NO YES If yes, please explain.

51. Do you believe there should be a formal hearing on this matter even if all parties are in agreement?

NO YES If yes, please explain.

52. Do you have any other recommendations relevant to this matter?

NO YES If yes, please explain.

Signature: _____

Name: _____

Address: _____

Telephone: _____

Email: _____

Attorney for: _____

Executed this ____ day of _____, 20____ .