

## **You have been appointed Guardian, now what?**

Thank you for your commitment and advocacy being appointed as an Outagamie County Guardian. The below information was created to help guide you on your next steps.

This information is to assist in establishing your role as a guardian, primarily relative to financial matters. You need to have the guardianship papers with you to complete the process. If you need certified copies, please contact the Register in Probate at 920 832-5601. **Do not give out your original guardianship letters.**

Please remember as guardian **you are not expected to use your personal money to pay any bills on behalf of your ward.** All money your ward receives, including Social Security benefits, wages, tax refunds, etc., is the money you are responsible for handling and accounting for annually.

### **REGISTER IN PROBATE**

The Register in Probate will be providing you with a packet following the appointment; this may happen in person or by mail, but you will receive the packet. Please take the time to read the information provided, as you are responsible for submitting an initial inventory and filing fee on behalf of your ward within **60 days** of appointment. You will also be required to use your ward's money to pay the filing fee. This is outlined in the informational packet along with sample documents of the required inventory, ledgers, accountings, and other forms.

Please complete the following steps when you receive your letters of guardianship:

### **BANKING**

Go to the bank of your choice and set up a checking account for your ward. You may also want to set up a savings account if appropriate--your choice. You will need to bring your letter of Guardianship of Estate and your ward's personal information. The bank may need to make a copy of the guardianship letter.

Avoid using any bank that will charge a monthly fee for the bank account or charges for paper statements. These expenses will be the Guardian's responsibility, not the ward's.

It is strongly encouraged you open a new account for your ward rather than just take over an existing account. Please make sure automatic withdrawals and deposits are transferred to the new account before closing the existing account. The account should have both the ward and Legal Guardian(s) names on the account. For example: James Jones, Jon and Meri Jones - Legal Guardians. Only the Guardian(s) is permitted to make any withdrawals on the account. Your ward should NOT have direct access to the account, including not having debit card linked to the account. **Do not mix your ward's money with your own or anyone else's. In addition, this may not be a joint account and you may not designate any payable on death individual.**

### **SOCIAL SECURITY ADMINISTRATION**

After finishing with the bank, you need call the Social Security Administration office (SSA) to schedule an appointment if your ward is on benefits or needs to apply for benefits. The telephone number is (877) 694-5495. The Appleton office is located at 607 West Northland Avenue in Appleton. Appointments are required at this time. If you are out of the Appleton area, you can go to your nearest Social Security office. To find the nearest office you can call the toll-free number for Social Security (800) 772-1213 or check the website [www.ssa.gov](http://www.ssa.gov). At the appointment, you can request a replacement Social Security card, Medicare card, or Forward card—if needed.

When making the appointment explain you have been appointed the legal Guardian of Estate and need to become the **representative payee**. You will need to bring your letter of Guardianship of Estate, your ward's personal information (full legal name, social security number, DOB, address), your own photo identification, and the routing and account information from the bank. The Worker will assist you in completing the paperwork. Please inform the SSA Worker if your ward receives Social Security and/or SSI, as multiple records need to be updated and this does not happen automatically. If you do not know what benefits your ward receives, please ask.

When appointed Representative Payee Social Security will confirm your status with a letter explaining the changes and start dates. The goal is to have the monthly payments directly deposited into the newly established bank account. Please confirm the money is deposited before making any withdrawals to avoid NSF charges. If the account accrues such fees, it is the **guardian's** responsibility to cover the costs, not the ward's.

### **STATE ID**

If your ward does not have a state photo ID you can assist by scheduling an appointment at the Department of Motor Vehicles (608) 264-7447. The Appleton office is located at 711 W Association Dr., Appleton. Specific information is needed to obtain a state ID and please call or check online for the details. The website is <https://wisconsindot.gov>. The guardianship is not related to this, however having a picture ID is a good thing to have.

### **ECONOMIC SUPPORT/INCOME MAINTAINANCE**

If your ward is receiving Medicaid, Foodshare or other public assistance it will be necessary to call and update the worker of the change in guardianship. Please call the East Central Consortia (888) 256-4563. Please have your ward's Social Security number readily available.

### **LONG TERM CARE**

If your ward is enrolled in Long Term Care/Family Care/IRIS, you will need to make contact with the Care Manager to review your ward and provide your contact information. This information will be shared with you if the ward is enrolled in a Long Term Care Program.

### **GUARDIAN AD LITEM BILL**

For all guardianship cases requiring a hearing, the Court is required to appoint an attorney to your ward. The attorney, referred to as a *Guardian Ad Litem* or *GAL*, is responsible for serving in the best interest of the person. The ward will receive a bill for this service and payment to the Court is required from the ward's assets. Fees vary based on individual cases. If there are difficulties in paying the bill, please contact the Register in Probate Office to establish a payment plan.

Please do not hesitate to reach out if you have questions.

Register In Probate (920) 832-5601

Aging and Long Term Support Division (920) 832-5178

Guardian Assistance Program (920) 572-6313

On-line Tutorial: <https://www.outagamie.org/how-to/learn-about-becoming-a-guardian>