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ENGROSSED HOUSE  
BILL NO. 2020

BY: VAUGHN (Ray), PELTIER  
and FERGUSON of the  
HOUSE

and

HENDRICK of the SENATE

AN ACT RELATING TO GUARDIAN AND WARD; AMENDING 30  
O.S. 1991, SECTION 4-303, WHICH RELATES TO CERTAIN  
ANNUAL REPORTS; EXEMPTING CERTAIN GUARDIANSHIPS  
FROM APPLICATION OF CERTAIN REQUIREMENTS; AND  
PROVIDING AN EFFECTIVE DATE.

BE IT ENACTED BY THE PEOPLE OF THE STATE OF OKLAHOMA:

SECTION 1. AMENDATORY 30 O.S. 1991, Section 4-303, is  
amended to read as follows:

Section 4-303. A. A Except as otherwise provided by subsection  
B of this section, a guardian or limited guardian of the property  
shall, upon the expiration of a year from the time of his  
appointment, and at least annually thereafter, present his accounts  
to the court for settlement and allowance as part of his  
guardianship report as required by Section 4-306 of this title.

B. 1. In addition, a guardian or limited guardian of the  
property shall:

~~1.~~ a. present accounts whenever the court requires that  
such report or accounts be presented~~+~~+ and

~~2.~~ b. with his annual report of his accounts, report any changes of property listed on the inventory required by Section 4-301 of this title. The report shall state the compensation requested by the guardian and for his attorneys.

~~3.~~ 2. If there has been a significant change in the physical or mental condition of the ward, or the ward's financial resources, the details thereof shall be set forth in the annual report required by subsection A of this section.

3. Except as otherwise directed by the court or required by the Uniform Veteran's Guardianship Act (72 U.S.C. 126.1, et seq.), the provisions of this subsection regarding the filing of an annual accounting and annual plan shall not apply to any guardianship of the property of a ward if the ward's financial resources or assets, other than a homestead, are worth less than Forty Thousand Dollars (\$40,000.00) if a bond has been posted, or are worth less than Ten Thousand Dollars (\$10,000.00) regardless of whether or not a bond has been posted, and if the guardian or limited guardian of the property is the spouse or a relative of the ward within the fourth degree of consanguinity.

C. In addition to the reports required by subsections A and B of this section, a guardian or limited guardian shall submit a report:

1. if the ward is an incapacitated or partially incapacitated person, when there is a significant change in the capacity of the ward to meet the essential requirements for his physical health or safety or to manage his financial resources;

2. if the ward is a minor, any significant change in the condition of the minor or in the condition of the estate of the minor;

3. when the guardian or limited guardian resigns or is removed;  
and

4. when the guardianship is terminated.

D. 1. A guardian or limited guardian of the person of an incapacitated or partially incapacitated person shall file a report on the guardianship of the person pursuant to Section 4-305 of this title.

2. A guardian of the person of a minor ward shall file such reports of the guardianship of the person of the ward as required by the court in such form as the court may require.

3. A guardian or limited guardian of the property of a ward shall file a report on the guardianship of the property pursuant to Section 4-306 of this title.

E. If the same person or organization is required to file reports as to both the person and the property of a ward, the reports may be consolidated.

F. An accounting information submitted by a guardian or limited guardian of the property of a ward shall be verified and shall be rendered in the same manner as required by Title 58 of the Oklahoma Statutes with respect to an information of an estate of a decedent. Such information shall also set forth any charges to the property of the ward which have accrued since the previous accounting or, in the case of an initial accounting, since the filing of an inventory of the property of the ward placed under the control of the guardian or limited guardian.

G. In addition to other specified information any order of the court approving an annual guardianship plan and report shall include the date certain by which the guardian shall file the next annual report.

SECTION 2. This act shall become effective September 1, 1992.

Passed the House of Representatives the 26th day of February, 1992.

Speaker of the House of  
Representatives

Passed the Senate the \_\_\_\_ day of \_\_\_\_\_, 1992.

President of the Senate