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## GUARDIANSHIP PROCEDURE

Due to Incompetency and  
Petition for Protective Placement/Services

ST. CROIX COUNTY  
PROBATE OFFICE  
1101 CARMICHAEL RD  
HUDSON WI 54016

HOURS:  
MONDAY – FRIDAY  
8:00 AM – 4:30 PM

PHONE: 715-386-4618 or 715-386-4619

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**NOTE:** This guideline is provided only as a public service and is not meant to be legal advice. The Register in Probate office cannot give legal advice; please contact an attorney if you have legal questions. This Guideline is subject to change or amendments.

A guardianship action for an incompetent is used to appoint someone to make medical and/or financial decisions for the incompetent person. Although attorneys often complete guardianships, the law allows for individuals to petition the court without hiring an attorney. A protective placement action is necessary when an incompetent individual meets the standards for placement/services. Pro se petitioners are responsible for completing all the legal requirements.

**TO COMMENCE PROCEEDING: Complete and file the following with the Register in Probate Office:**

- Petition for Guardianship due to Incompetency (Form GN-3100)
- Petition for Protective Placement/Services (Form GN-4040) (if seeking Protective Placement/Services)
- Order and Notice of Hearing (Form GN-3110) (Hearing date to be obtained from probate court at time petitions are filed with the Probate Office)
- Waiver and Consent to Petition for Guardianship due to Incompetency (Form GN-3115)
- Affidavit of Service (Form GN-3120)
- Order Appointing Guardian ad Litem (Form GF-131) \*see below
- Statement of Acts by Proposed Guardian and Consent to Serve (Form GN-3140)
- Order for Comprehensive Evaluation (Check with the Register in Probate office to see if this Order is required.) A comprehensive evaluation is necessary to meet the requirements of protective placement. You must make arrangements with the county Human Services Department to complete this evaluation. Their report must be filed with the Register in Probate four days prior to the court hearing.
- Examining Physician/Psychologist report (Form GN-3130). A doctor, psychiatrist or psychologist must complete a full mental health examination of the proposed ward; the report must be filed with the Probate office at least 96 hours prior to the hearing. A copy must be sent to the Guardian ad Litem.

**\*A GUARDIAN AD LITEM (ATTORNEY) WILL NEED TO BE APPOINTED FOR THE ALLEGED INCOMPETENT PERSON (WARD) TO REPRESENT THE BEST INTERESTS OF THE PROPOSED WARD (Form GF-131).** The Petitioner is responsible for obtaining the Guardian ad Litem (GAL). The Court will sign the Order Appointing GAL once filed by the Petitioner. Depending on local practice, a list of attorneys who may act as a GAL may be available from the Register in Probate. The Petitioner is responsible for the GAL fees unless otherwise ordered by the Court (check with the Register in Probate for local county practice). The Guardian ad Litem will meet with the proposed ward and the proposed guardian and will make a recommendation to the court as to what is in the best interest of the ward.

**HEARING/GIVING NOTICE:**

- A hearing will be scheduled by the Probate Court and an Order and Notice of Hearing (GN-3110) will be signed and copy provided to petitioner.
- Service requirements: The Petitioner shall serve notice of the Petition for Guardianship (and the Petition for Protective Placement) and the Order and Notice of Hearing on the proposed ward by personal service no less than 10 days prior to hearing. The petitioner shall also provide notice to all other interested persons either in person or by mail at least 10 days prior to hearing. **ALL INTERESTED PARTIES MUST RECEIVE NOTICE OF THE HEARING.** See Wis. Stat. 54.38(2)(a) and (b) for interested persons.

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### **TRAINING REQUIREMENTS FOR NOMINATED GUARDIANS:**

- Effective 1/01/2023, any person nominated to be appointed guardian of the person and/or guardian of the estate of an alleged incompetent adult is required to satisfy the guardian training requirements under Sec. 54.26, Wis. Stats. This individual must provide confirmation to the Court at least 96 hours prior to the final hearing that the training requirement has been met. They must complete and file Form GN-3135, Confirmation of Completion of Guardian Training Program (Adult Guardianship), with the Court along with the training completion certificate. This training is mandatory and the Court will not appoint a guardian who has not completed the training requirements.
- To enroll in this free online course, individuals can visit <https://www.uwgb.edu/guardianship-training/> . This course is self-paced and is accessible 24/7. If an individual does not have access to a computer and/or Wi-Fi, they can find a list of free public computers and internet access in their county through the link on this website. An individual may also contact their local library for computer access.
- Confirmation of Completion of Guardian Training Program (Form GN-3135)

### **THE COURT HEARING:** Forms to have completed and with you at time of hearing:

- Determination and Order on Petition for Guardianship due to Incompetency (Form GN-3170)
- Order on Petition for Protective Placement/Services (GN-4060)
- Letters of Guardianship of Person (Form GN-3200)
- Letters of Guardianship of Estate (Form GN-3210)
- Affidavit of Service (GN-3120)
- Note: You must be prepared to provide all evidence required by the court before your petitions can be granted.

**POST HEARING:** If you are appointed guardian of the estate, you will be required to complete and file an Inventory (Form GN-3440) of the ward's assets as of the date of appointment. This form must be completed and filed with the Register in Probate within 60 days of appointment. A 0.2% filing fee (minimum of \$20.00 if assets are \$50,000 or less) must accompany the Inventory. Each January you will receive an annual accounting form to complete and file by the following April 15<sup>th</sup>. If you are appointed guardian of the person, you will be required to complete an annual report on the condition of the ward.

**CERTIFIED COPIES:** of Letters of Guardianship are available from the Register in Probate Office. The certification fee is \$3.00, plus \$1.00 for each page copied and certified.

**FORMS:** guardianship forms are available on the Wisconsin Court System website at [www.wicourts.gov](http://www.wicourts.gov) by clicking on "Forms", "Circuit Court", then "Guardianship".

**NOTE:** If the ward meets certain income criteria, St. Croix County may be able to assist you with the guardianship procedure. You may contact the St. Croix County Human Services Department and speak with an adult social worker at 715-246-8250, to see if the County can assist.