

STATE OF MICHIGAN

IN THE PROBATE COURT FOR THE COUNTY OF WAYNE

IN THE MATTER OF:

BETSEY DOE,
A Protected Individual.

File No. 2020-000000-CA

Hon. Terrance A. Keith

JANE S. ESQUIRE (P0000)
Guardian Ad Litem
1234 Lawyer Avenue
Detroit, MI 48226
734-123-4567

Hearing: November 6, 2023 @ 2:00 p.m.

ACCEPTANCE OF TRUST AND REPORT OF GUARDIAN AD LITEM
(PETITION TO ALLOW 3rd ACCOUNT)

RECOMMENDATION TO APPROVE

I, the undersigned, duly appointed Guardian Ad Litem for BETSEY DOE, and all persons interested herein, who are legally incompetent to act on their own behalf, and all persons who are or may become interested herein, although unborn, unknown, undetermined, unascertained or legally incompetent to act in their own behalf, do hereby accept the trust imposed on me as Guardian Ad Litem with reference to the petition filed in this Court and state in relation thereto as follows:

Before this Court is the 3rd Annual Account filed by the conservator, Professional Conservator, Inc. This Guardian Ad Litem reviewed the prior report and records, in addition to the records provided by the conservator, and corresponded with representatives of its office.

1. The account period is identified as August 1, 2022 to July 31, 2023, a twelve-month period. It should be noted that the 2nd account was identified as ending in July 2020, but it was previously noted in the GAL Report to the 2nd Account that the accounting actually concluded on August 2, 2022. The beginning balance for this account matches the ending balance of the 2nd Account as allowed. In addition, the account is mathematically correct on its face.

2. **Schedule A**. The total income reported in the third account period is shown as \$57,446.76. The income is comprised of the ward's pension (1 month paid at \$2,355.30, 3 months paid at \$2,375.34, and 8 months paid at \$2,379.43) and Social Security (3 months at \$2,158, and 9 months at \$2,184). The conservatorship also received and deposited federal government stimulus payments totaling \$2,000. The statements verify this income and it is accurately reported. In addition, Schedule A reports the Prepaid Funeral as added (now included in Schedule D), which was purchased during the prior accounting period. The cost was \$800 and this is the value used for the account.

3. **Schedule B**. The expenses reported during this account period total \$53,903.64. Of this total amount, \$47,370.48 was paid or disbursed for the ward's housing costs. In addition, \$1,252, \$20, \$1,400, and \$600 was used for the ward's prescriptions, medical co-pay, spending money, and cell phone, respectively. The balance of expenditures, totaling \$3,260.22, were for administrative costs of this matter, including but not limited to account and attorney fees, prior fiduciary fees, computer costs, debit card fees, and prior GAL fees. These expenditures appear reasonable and appropriate as expenditures made on behalf and for the benefit of Ms. Doe.

4. **Schedule C**. Schedule C reports no transactions.

5. **Schedule D.** The account reports a \$36,439.32 balance of assets remaining identified in Schedule D. This GAL reviewed the bank statements that verify the balances when adjusted for two issued checks for housing costs of the ward that cleared after the close of the accounting period are deducted.

6. **Attorney and administrative fees.** The account requests approval of \$1,055 attorney fees and \$3,213.22 (with \$3,012 owed and not yet paid) for fiduciary/administrative fees and costs - these fees are itemized in the attachment to the Account. These fees appear reasonable and the services all appear related to and for the benefit of the ward and the administration of the conservatorship.

7. **Bond.** The conservator is serving under a \$50,000 bond. The annual income is approximately \$54,600 and the balance of liquid assets at the close of the accounting period equals \$35,639. Therefore, this GAL recommends an increase in the amount of bond to total \$85,000.

RECOMMENDATION

In summary, this GAL recommends approval of the Petition to Allow the 3rd Account including fees and costs. Further, this GAL recommends an increase in the bond amount to total \$85,000.

This GAL requests \$450.00 as fees for her review of this account and preparation of this report.

I declare under penalty of perjury that I have read the foregoing Report of Guardian Ad Litem and find it to be true to the best of my information, knowledge, and belief.

Dated: October 22, 2023

Respectfully Submitted:

/s/Jane S. Esquire
JANE S. ESQUIRE (P00000)
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