



Volunteer Guardianship ONE ON ONE, INC.

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REFERRAL FOR GUARDIANSHIP FORM

Referral Source

Date: _____

Name of referral source: _____ Title: _____

Relationship to person: _____

Company/organization: _____

Phone: _____ Email Address: _____

Current Legal Status

Has the individual already been legally declared incapacitated? _____

If yes, on what date? _____ Who is the current guardian/caretaker? _____

If no, have there been two documented medical opinions stating the person is incapacitated? _____

Is there an entity willing/in the process of bringing the verified complaint to the surrogate's court?

If yes, who? _____

Is there any reason to think this will be contested? _____

Potential Incapacitated Person (aka ward)

First Name of potential ward: _____ Current age _____

Current address of potential ward:

Street Address _____ City _____ State _____

County _____

Name of facility (if applicable) _____ \

How stable is this location? _____

If this is not their permanent address, where is their permanent home?

Street Address _____ City _____ State _____

County _____

Reason for incapacitation/need for guardian: _____

Current medical/health status: _____

What is the level of care required? _____

Does individual have medical insurance? _____ If yes, who? _____

Is there a psychiatric diagnosis? _____ If so, what is it? _____

Is the individual compliant with medication? _____

Is there any known history of violence or other types of aggressive behavior? _____

If yes, please describe: _____

Does the individual wander/are they a flight risk? _____

Financial

Current income amount (estimated/known): _____

Source of income: _____

Current assets (estimated/known): _____

Are there any current or anticipated complex financial issues? _____

Are there any family members/close friends known/involved? _____

If so, who? _____

Ward/Guardian compatibility

Please describe what is known about the personality/life of the potential ward. Who is she/he? _____

What kind of traits do you think would be important in a potential guardian? _____

Is there anything else that would be helpful for us to know? _____
