

## Summary of Reporting Requirements

Private Professional Guardians (PPG) to Judicial Branch Certification Commission (JBCC) and to County Clerks

For Calendar Year 2017

### To JBCC

Government Code § 155.105(b) and Rule 7.3(f) of the JBCC Rules

Reporting requirements are the same as last year with reports submitted to the JBCC.

The following information must be reported to the JBCC no later than January 31 each year for the preceding calendar year:

- number of wards served by the PPG, reported by county in which the application to create a guardianship was filed
- total number of wards served by the PPG
- name, business address, and business telephone of each person providing guardianship services to a ward of the PPG on behalf of the PPG
- amount of funds received from the State of Texas or other public source for the provision of guardianship services, reported by source
- total amount of public funds received
- aggregate fair market value of the property of all wards that was managed by the PPG
- whether PPG was removed by court or resigned for any reason, and if so, an explanation of the circumstances
- re-affirm Rule 7.2(b)(6) and (7) (related to requirements for certification)
- PPG must submit a copy of his/her application(s) for certificate(s) of registration, as required by Estates Code § 1104.302-303 [formerly Probate Code § 697(a)], with the report to the JBCC

### To County Clerks

Estates Code § 1104.302-306 [formerly Probate Code § 697]

PPGs must apply annually for a certificate of registration to the clerk of each county in which they are appointed or plan to seek appointment as guardian. The requirement to register with the clerk has been in existence since September 1, 1993. The last change to the information that must be contained in the annual application for a certificate of registration was effective September 1, 2009:

- the certification number or provisional certification number issued by the JBCC to the private professional guardian or person representing ward's interests on behalf of the private professional guardian

Any questions regarding the registration with the county clerk should be directed to the appropriate clerk's office.