

Rule 7.11—Form 3: *Guardian's Initial Care Plan for Protected Person*

Instructions:

- Guardian must complete, sign, and file this form with the court within sixty (60) days of appointment.
- Do not include protected information on this form. For protected information, complete Rule 7.11—Form 1: Protected Information Disclosure.
- The purpose of the Initial Care Plan is to provide the court with a complete picture of Protected Person's current situation, Protected Person's needs, and Guardian's plan to meet those needs.
- Provide as much detailed information as possible.

If you do not understand how to use this form, or if you are unsure whether you should use this form, talk to an attorney.

In the Iowa District Court for _____ County

In the Matter of the Guardianship of:

Probate no. _____

Full name: first, middle, last

**Guardian's Initial Care Plan for
Protected Person**

Protected Person.

Iowa Code § 633.669(1)(a)

Guardian states as follows:

1. Guardian's information

A. Guardian's name:

Full name: first, middle, last

B. Guardian is Protected Person's: *Check one*

Spouse

Adult child

Parent

Adult Sibling

Other: _____

Continued on next page

2. Protected Person's information

A. Protected Person's age: _____.

B. Reason for guardianship:

Check this box if you have attached a sheet with additional information.

C. Protected Person's highest education level attained:

High school

College or University

Other: _____

D. Does Protected Person have a Living Will?

Yes No

If you checked *Yes*, complete (1)–(2).

(1) Do you have a copy of Protected Person's Living Will?

Yes No

(2) Where is the Living Will located?

Full name: first, middle, last / business name

Mailing address

City

State

ZIP code

(_____) _____
Phone number

Email address

Additional email address, if applicable

Continued on next page

E. Does Protected Person have a Healthcare Power of Attorney?

Yes No

If you checked Yes, complete (1)–(2).

(1) Who is serving as the agent (attorney-in-fact)?

Full name: first, middle, last

Mailing address

City

State

ZIP code

(_____) _____
Phone number

Email address

Additional email address, if applicable

(2) Where is the Healthcare Power of Attorney located?

Full name: first, middle, last / business name

Mailing address

City

State

ZIP code

(_____) _____
Phone number

Email address

Additional email address, if applicable

3. Protected Person's residence and interaction with Guardian

A. Does Protected Person currently live with Guardian? Check Yes or No below.

Yes

If you checked Yes, complete the next section.

Describe Guardian's daily interaction with Protected Person:

Check this box if you have attached a sheet with additional information.

Continued on next page

No

If you checked No, complete (1)–(5).

(1) Protected Person's current residence:

Mailing address

City

State

ZIP code

(2) Date Protected Person began living at current residence:

_____, 20____.
Month Day Year

(3) How often does Guardian plan to visit or have other contacts (e.g. by mail, email, social media, and phone) with Protected Person? *Check all that apply*

Daily

Weekly

Monthly

Other: _____

(4) How does Guardian plan to interact with Protected Person? *Check all that apply*

In person

Mail, email, or social media

Phone

Other: _____

(5) Describe the types of activities with or on behalf of Protected Person that Guardian plans:

Check this box if you have attached a sheet with additional information.

Continued on next page

B. Does Protected Person's current living situation best meet Protected Person's future needs?

Yes No

If No, describe Guardian's plan for meeting those needs:

Check this box if you have attached a sheet with additional information.

4. Protected Person's expenses

A. Estimate of Protected Person's expenses:

Type of expense	Amount estimated <i>Check one</i> <input type="checkbox"/> monthly <input type="checkbox"/> annual
(1) House payment or rent	\$
(2) Food <i>At home & restaurants</i>	\$
(3) Transportation (<i>gas, bus fare</i>) <i>Not car loan payments – see (15).</i>	\$
(4) Clothing	\$
(5) Medical, dental <i>Not health insurance payments – see (11).</i>	\$
(6) Utilities (<i>gas, electric, water</i>)	\$
(7) Phone	\$
(8) Cable / satellite television / internet	\$
(9) Car insurance payment	\$

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(10) Health insurance payment	\$
(11) Transportation	\$
(12) Educational or vocational training expenses	\$
(13) Credit card payments	\$
(14) Car loan payments	\$
(15) Other loan payments	\$
(16) Other expense <i>Identify:</i>	\$
(17) Other expense <i>Identify:</i>	\$
(18) Other expense <i>Identify:</i>	\$
(19) Other expense <i>Identify:</i>	\$
(20) Totals from attached sheets, if any <input type="checkbox"/> <i>Check this box if you have attached a sheet with additional information regarding expenses.</i>	\$
Total expenses	\$

B. Who will pay Protected Person's expenses? *Check all that apply*

- Guardian
- Spouse
- Adult sibling or siblings
- One or both of Protected Person's parents
- A court-appointed conservator
- Other: _____

Continued on next page

C. Information regarding payer of Protected Person's expenses:

Full name: first, middle, last

Mailing address

City

State

ZIP code

(_____) _____
Phone number

Email address

Additional email address, if applicable

D. If Guardian is responsible for paying Protected Person's expenses, describe Guardian's plan for payment of Protected Person's living expenses and other expenses:

Check this box if you have attached a sheet with additional information.

5. Protected Person's health

A. Protected Person's physical health

(1) Describe Protected Person's current medical health status, identifying any medical concerns:

Check this box if you have attached a sheet with additional information.

(2) Guardian's plan for meeting Protected Person's medical care needs:

Check this box if you have attached a sheet with additional information.

Continued on next page

B. Protected Person's dental health

(1) Describe Protected Person's current dental health status, identifying any dental health concerns:

Check this box if you have attached a sheet with additional information.

(2) Guardian's plan for meeting Protected Person's dental health care needs:

Check this box if you have attached a sheet with additional information.

C. Protected Person's mental health

(1) Describe Protected Person's current mental health status, identifying any mental, cognitive, behavioral, or emotional concerns:

Check this box if you have attached a sheet with additional information.

(2) Guardian's plan for meeting Protected Person's mental, cognitive, behavioral, or emotional needs:

Check this box if you have attached a sheet with additional information.

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D. Other health concerns

(1) Identify any other health care concerns related to Protected Person:

Check this box if you have attached a sheet with additional information.

(2) Guardian's plan for meeting other health care concerns identified:

Check this box if you have attached a sheet with additional information.

6. Protected Person's education, training, and other vocational services and employment status

A. Is Protected Person enrolled in or attending school?

Yes No

If you checked **Yes**, complete (1)–(2).

(1) School information:

School name where Protected Person is enrolled or attending

School mailing address

City

State

ZIP code

(2) Does Protected Person receive or need special education or related services?

Yes No

If Yes, describe:

Check this box if you have attached a sheet with additional information.

Continued on next page

B. Is Protected Person employed?

Yes No

If you checked Yes, complete (1)–(3).

(1) Protected Person is employed:

Fulltime.

Part-time.

Other: _____.

(2) Employer's information:

Employer's name

Employer's mailing address

City

State

ZIP code

Supervisor's name

(_____) _____
Supervisor's phone number

Supervisor's email address

(3) Describe Protected Person's employee duties:

Check this box if you have attached a sheet with additional information.

C. Does Protected Person receive or need educational, training, or other vocational assistance?

Yes No

If you checked Yes, complete (1)–(2).

(1) Describe Protected Person's educational, training, and vocational needs:

Check this box if you have attached a sheet with additional information.

Continued on next page

(2) Guardian's plan for meeting educational, training, and vocational needs identified:

Check this box if you have attached a sheet with additional information.

7. Other professional services

A. Does Protected Person require any professional services other than those listed above?

Yes No

If you checked Yes, complete B and C, otherwise skip to 8.

B. Other professional services Protected Person requires:

Check this box if you have attached a sheet with additional information.

C. Guardian's plan to provide the professional services required:

Check this box if you have attached a sheet with additional information.

8. Protected Person's social activities

A. Does Protected Person require assistance with participation in social activities?

Yes No

If you checked Yes, complete the next section.

Continued on next page

B. Guardian's plan for assisting Protected Person's participation in social activities:

Check this box if you have attached a sheet with additional information.

9. Protected Person's contact with family members and other significant persons

A. Will arrangements be made for regular contacts between Protected Person and Protected Person's family members (e.g., spouse, parents, adult children, and adult spouse)?

Yes

If you checked Yes, complete the following sections as appropriate.

(1) Family member's name: _____.

Relationship to Protected Person: _____.

Describe arrangements planned for contact with this person:

Check this box if you have attached a sheet with additional information.

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(2) Family member's name: _____.

Relationship to Protected Person: _____.

Describe arrangements planned for contact with this person:

Check this box if you have attached a sheet with additional information.

Check this box if you have attached a sheet with additional family members.

No

If you checked NO, complete the next section.

Explain why:

Check this box if you have attached a sheet with additional information.

Continued on next page

B. Will arrangements be made for regular contacts between Protected Person and other significant persons (e.g., friends, former co-workers, and clergy)?

Yes

If you checked Yes, complete the following sections as appropriate.

(1) Significant person's name: _____.

Relationship to Protected Person: _____.

Describe arrangements planned for contact with this person:

Check this box if you have attached a sheet with additional information.

(2) Significant person's name: _____.

Relationship to Protected Person: _____.

Describe arrangements planned for contact with this person:

Check this box if you have attached a sheet with additional information.

Check this box if you have attached a sheet with additional significant persons.

Continued on next page

No

If you checked NO, complete the next section.

Explain why:

Check this box if you have attached a sheet with additional information.

10. Additional information

Additional information that may be useful for the court to know in determining what is in Protected Person's best interest:

Check this box if you have attached a sheet with additional information.

11. Fees for Guardian

Check one

Fees are applied for. *Attach affidavit relative to compensation (Iowa Code section 633.202).*

Fees are waived.

12. Fees for Guardian's attorney

Check one

Fees should be set by the court. *Attach affidavit relative to compensation (Iowa Code section 633.202).*

Fees are not requested.

Fees are waived or not applicable.

Continued on next page

13. Attorney Help *Check one*

- A. An attorney did not help me prepare or fill in this paper.
- B. An attorney helped me prepare or fill in this paper.

If you check B, you must fill in the following information:

Name of attorney or organization, if any

Business address of attorney or organization

City

State

ZIP code

(_____) _____
Phone number

Fax number

Email address

Additional email address, if applicable

14. Oath and signature of Guardian

I, _____, have read this Initial Care Plan, and I certify
Print your name

under penalty of perjury and pursuant to the laws of the State of Iowa that the information I have provided in this Initial Care Plan is true and correct.

_____, 20_____
*Month Day Year Signature**

Mailing address

City

State

ZIP code

(_____) _____
Phone number

Email address

Additional email address, if applicable

**Handwrite your signature on this form. Scan the form after signing it and file it electronically.*