

Guardianship Clinic Online Training & Materials For Law Student Volunteers



Questions? Contact Dean Schultz (angela.schultz@marquette.edu). Also contact Dean Schultz to have your draft forms reviewed before submitting them to the attorney.

I. Click [HERE](#) to watch the training video

Stream the video using Internet Explorer or Google Chrome. Another browser may not work.

II. Review the Referral Materials

You will receive a packet of information that was gathered by a social worker at Children's Hospital and an Examining Physician's or Psychologist's Report. Review the materials carefully and prepare the forms listed in Section III below. When you send your draft forms to the attorney, please include in your email a list of any discrepancies you see between what the doctor's report says and what the client requests in the information packet regarding rights to be removed or retained.

III. Forms You Should Prepare

The latest version of the forms are available in fillable Word format on the [Wisconsin Courts website](#). Before the initial meeting, complete and submit drafts of the following forms to the attorney for review (consult the sample forms linked below):

- ✓ **The Petition for Permanent Guardianship Due to Incompetency**
- ✓ **Sample Rider to Accompany the Petition** (This is not a court form. [Download a version in Word here](#) or create your own based on the sample provided on page 8 of the sample Petition linked in #4 below. To determine the interested parties in your case, refer to the sample rider itself *and* to pages 9 & 10 of the "Instructions for Handling a Guardianship of the Person" linked in #2 below.)
- ✓ **Statement of Acts by Proposed Guardian and Consent to Serve as Guardian**
- ✓ **Order and Notice of Hearing**
- ✓ **Order Appointing Guardian ad Litem or Attorney**

After the initial meeting, and at least one week before the hearing, prepare and send to the attorney the following forms:

- ✓ **Letters of Guardianship of the Person**
- ✓ **Determination and Order on Petition for Guardianship Due to Incompetency**
- ✓ **Affidavits of Service**
- ✓ **Hearing Data Sheet** (This is not a court form. [Download a version in Word here](#). If you have trouble, email Dean Schultz and ask for an electronic copy).

IV. General Information and Sample Forms

General Information

1. [Overview and General Information about Guardianship](#)
2. [Instructions for Handling a Guardianship of the Person](#)
3. [Map and Address of Meeting Location at Children's Hospital](#)

Sample Forms

Always download the newest form from the [Wisconsin Courts website](#). Use the samples here to guide you.

4. [Examining Physician's or Psychologist's Report \(completed by doctor\)](#)
5. [Petition for Permanent Guardianship Due to Incompetency and Sample Rider*](#)

*STUDENTS: Please create your own rider using the sample contained on page 8 of the Petition linked in #5 above. To determine the interested parties in your case, refer to the sample rider itself *and* to pages 9 & 10 of the "Instructions for Handling a Guardianship of the Person" linked in #2 above.

6. [Statement of Acts by Proposed Guardian and Consent to Serve as Guardian](#)
7. [Order and Notice of Hearing](#)
8. [Order Appointing Guardian ad Litem or Attorney](#)
9. [Affidavits of Service](#)
10. [Report of Guardian ad Litem \(completed by GAL\)](#)
11. [Hearing Data Sheet \(Milwaukee County only\)](#)
12. [Determination and Order on Petition for Guardianship Due to Incompetency](#)
13. [Letters of Guardianship of the Person](#)
14. [Annual Report on the Condition of the Ward](#)
15. [Notice of Change of Address](#)

Other Sample Documents

16. [Letter to Guardian for Signature on Documents Not Signed at Initial Meeting \(Eng and Span\)](#)
17. [Letters to Interested Persons with notice \(Eng and Span\)](#)
18. [Sample Questions for Taking Testimony](#)