

Annual/Final Account Form

Summary of Account

OPG Ref: PG / / /

Account of:

As financial guardian(s) to:

Period Covered: to

Caution Amount: £

Annual Premium: £

Now go to Schedule 1 on page 2

Summary of Estate as at <input type="text"/>	Schedule 1	£ <input type="text"/>
Investment Income	Schedule 2	£ <input type="text"/>
Pensions / Benefits	Schedule 3	£ <input type="text"/>
Any other income	Schedule 4	£ <input type="text"/>
Gain	Schedule 1	£ <input type="text"/>
	Total	£ <input type="text"/>

Living Expenses	Schedule 5	£ <input type="text"/>
Other Expenditure	Schedule 6	£ <input type="text"/>
Loss	Schedule 1	£ <input type="text"/>
Estate as at <input type="text"/>	Schedule 1	£ <input type="text"/>
	Total	£ <input type="text"/>

Investments made during the period of this account	Schedule 1	£ <input type="text"/>
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I confirm that this is a true and fair reflection of my transactions with the above estate during the period of this account.

Financial Guardian(s)

Date
 Date
 Date

Schedule 1 - Grand Total

Schedule 1 (moveable assets) Totals	£	£	£	£	£	£
Schedule 1 (heritable assets) Totals	£	£	£	£	£	£
Grand Total Schedule 1	£	£	£	£	£	£

Schedule 7 - Contact with Adult

Please provide a brief report on your contact with the adult/adult's primary carer or any interested parties throughout the accounting period.

Your Contact Details

Please complete this section, as we may need to contact you if further information or clarification is required regarding the summary of account.

If more than one financial guardian has been appointed, please tell us which guardian will act as the primary point of contact.

Name:

Tel No. (during working hours):

Mobile No:

E-mail address:

Checklist

Have you:

- 1 Entered the relevant PG reference number to the Summary Page?
- 2 Signed and Dated the Summary Page?
- 3 Enclosed the relevant Fee/Fee Exemption Form?

Enclosed full supporting documentation, i.e.:

- Bank Statements/Passbooks for each account, covering the full accounting period?
- All contract notes in respect of purchases/sales (Stocks/Shares)?
- Receipts/Invoices for purchases of individual items of £100 or over?
- Correspondence from DWP/Benefits Agency showing entitlements throughout the Accounting Period?

Once the form has been fully completed and signed it should be sent to:

Office of the Public Guardian
Hadrian House
Callendar Business Park
Falkirk
FK1 1XR

DX: 550360 Falkirk 3
LP: LP-17 Falkirk

Telephone: 01324 678300
Fax: 01324 678301

E-mail: opg@scotcourts.gov.uk
Website: www.publicguardian-scotland.gov.uk