**Guidance notes**

Tell us the name of all financial guardians and the accounting period in the boxes provided. The accounting period can be found on the covering letter issued from this office requesting the account.

**Section 1 + 2**

This relates to the adult’s heritable property i.e. if they own their own house.

**Section 3**

This relates to the bank accounts held by the adult and any assets that they have. You should list the bank account details including the name of the bank, the account number and the account holder’s name.

 **EVIDENCE REQUIRED**

e.g.

**All statements and/or passbooks covering the accounting period for the bank accounts listed in section 3**

Bank of Scotland 00112233 Mr J. Bloggs

Clydesdale 0000000 Mr & Mrs Bloggs

**Section 4**

This relates to the benefits awarded to the adult. This may include state pension, pension credits, private pension, DLA, income support. Independent living fund or direct payments should not be included as these are supervised by the provider.

 **EVIDENCE REQUIRED**

e.g.

**Award letters from DWP / pension provider**

DLA care

DLA mobility

State pension

**Section 5**

This relates to the expenditure of the adult during the accounting period. This should just be a summary of what the benefits etc. were used for. This may include care costs, clothing, toiletries, holidays etc. There is no requirement to put the actual amounts spent.

 **EVIDENCE REQUIRED**

**Receipts for any purchases of individual items made for the adult in excess of £200.00**

Care home fees

Clothes

e.g.

**Section 6**

This relates to caution (an insurance bond which protects the adult in relation to the guardian’s actings). At the initial court hearing the Sheriff may have set caution. If so, note the renewal date and supply evidence of the renewal.

**Section 7**

Tick the box to acknowledge contact with either the adult or their care providers during the accounting period.

April 2025