**Public Guardian’s Ref: Date of court appointment:**

**Adult’s details**

Title

Name

Current address

**Guardian’s details**

Title

Name

Email address

Telephone number

If more than one financial guardian has been appointed, please tell us who will be the primary point of contact. This will be helpful if we need clarification or further information.

Are you the primary contact? Yes

No

**Joint guardian’s details (if applicable)**

Title

Name

Email address

Telephone number

Are you the primary contact? Yes

No

**Joint guardian’s details (if applicable)**

Title

Name

Email address

Telephone number

Are you the primary contact? Yes

No

**Section 1 Adult’s regular living expenses**

|  |  |  |  |
| --- | --- | --- | --- |
| **Item** | **Amount** | **Frequency** | **Annual amount** |
| Gas |  |  |  |
| Electricity |  |  |  |
| Telephone |  |  |  |
| Satellite /cable TV |  |  |  |
| TV license |  |  |  |
| Mortgage/rent |  |  |  |
| Insurances |  |  |  |
| Council tax |  |  |  |
| Care charges |  |  |  |
| Loan repayments |  |  |  |
| Support for dependents |  |  |  |
| Food and household expenses |  |  |  |
| Clothing |  |  |  |
| Holidays |  |  |  |
| Other – please specify e.g. subscriptions, toiletries, hairdressing, sweets, pocket money etc. |  |  |  |
|  |  |  |  |

**Total annual expenditure**

**£**

**Section 2**  **Intended use of heritable property**

Please tell us if the adult, adult's family, spouse or partner etc. will continue to live there or if the property is to be sold or rented etc.

**Section 3 Proposed method of investment / disposal of moveable assets**

Please complete the following

Is the moveable estate:

Under £100,000

Over £100,000  financial advice is enclosed or  financial advice is to follow

* In order to maintain the adult’s lifestyle and expenditure as appropriate and maximise the return from their income and investments, use the space below to state what actions you propose to take. For example, with regards to the adult’s bank/building society accounts do you intend to make any changes such as moving the funds from one account to another type of account or perhaps intend making no changes at all?
* If the adult has other income or investments such as stocks and shares, please outline below what you propose to do.
* If there is a shortfall between the adult’s annual income and expenditure, tell us how you propose to deal with this.

**Section 4**  **Tax planning proposals** - please note proposals must be in line with the wishes of the adult as far as they can be ascertained and HMRC guidelines.

**Section 5 Proposals for provision of gifts** e.g. birthday, anniversary, Christmas etc.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Number of recipients** | **Purpose** | **Amount** | **Frequency** | **Annual amount** |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
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|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

**Total**

**£**

**Section 6 Other proposals**

**Section 7 Proposals for contact with the adult a**

**Section 7 - Proposals for contact with the adult and / or any other relevant persons**

To ensure that the adult’s needs are identified and will be met the Code of Practice advises that where possible it is good practice to meet the adult, nearest relative, primary carer, social worker, named person or any other person with an interest in the adult’s affairs at least once every six months.

**nd /or any other relevant persons**

**Section 6 Signature of financial guardian(s) -** Where more than one financial guardian is appointed all require to sign and date below

**Financial guardian Date**

**Financial guardian Date**

**Financial guardian Date**

The form is now complete, please send it by post or email to:

The Office of the Public Guardian Hadrian House Callendar Business Park Callendar Road Falkirk FK1 1XR DX: 550360 Falkirk 3

Telephone: 01324 678300 E-mail: [OPGOrders@scotcourts.gov.uk](mailto:OPGOrders@scotcourts.gov.uk) Website: [www.publicguardian-scotland.gov.uk](http://www.publicguardian-scotland.gov.uk) X : @OPGScotland

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