



THE STATE
of

ALASKA *Department of Commerce, Community, and Economic Development
Division of Corporations, Business and Professional Licensing*

Guardians and Conservators Program

PO Box 110806, Juneau, AK 99811

Phone: (907) 465-2550

Email: GuardiansAndConservators@Alaska.Gov

Website: ProfessionalLicense.Alaska.Gov/GuardiansConservators

Guardian or Conservator Annual Report Checklist

The annual report is due within 30 days following the end of each calendar year. Do not duplicate information. Send the completed annual report and required documents directly to:

Department of Administration - Office of Public Advocacy
900 West 5th Avenue
Anchorage, AK 99501.

Licensee Name:		AK License Number:	
<input type="checkbox"/> I understand the annual report must be submitted to the office of public advocacy.			

You must attach the following:

- ☐ Evidence of the continuing existence of a court ordered bond, if any, required by a court to be maintained by the guardian or conservator.
- ☐ A list, including case numbers, of the ward(s) and/or protected person(s) for whom you are acting as a private professional "full" or "partial" guardian or private professional conservator.
- ☐ An accurate financial statement, including total fees collected from the protected person(s), total business expenses, and documents necessary to establish financial solvency.
- ☐ A letter stating you have filed all required court reports in the previous calendar year.
- ☐ A copy of all your federal tax documents filed with the Internal Revenue Service and all of your correspondence with the Internal Revenue Service for the calendar year. (See note below.)

Sec. 08.26.080. Annual report.

- (a) Within 30 days following the end of each calendar year, a licensee shall submit to the office of public advocacy, Department of Administration
- (1) evidence of the continuing existence of a court ordered bond, if any, required by a court to be maintained by the guardian or conservator;
 - (2) a list, including case numbers, of the wards and protected persons for whom the licensee is acting as a private professional guardian or private professional conservator;
 - (3) an accurate financial statement of the licensee, including total fees collected from the protected person, total business expenses, and documents necessary to establish financial solvency of the licensee;
 - (4) a letter stating that the licensee has filed all required court reports in the previous calendar year; and
 - (5) a copy of all of the licensee's federal tax documents filed with the Internal Revenue Service and all of the licensee's correspondence with the Internal Revenue Service for the calendar year.
- (b) The office of public advocacy shall notify the department of the licensee's compliance with (a) of this section.

NOTE: In AS 08.26.080(5), the statute is silent concerning which tax year documents are to be submitted. Until further legislative clarification is provided, the division's position is that it is the preceding calendar year (i.e., in 2014, submit tax returns filed with the IRS in 2013).

Signature

By my signature below, I certify the above information is true and correct to the best of my knowledge.

Licensee Signature:		Date Signed:	
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