



Michigan Supreme Court

State Court Administrative Office
Michigan Hall of Justice
P.O. Box 30052
Lansing, Michigan 48909
Phone (517) 373-0128

Carl L. Gromek, Chief of Staff
State Court Administrator

MEMORANDUM

DATE: January 3, 2007

TO: Chief Probate Judges
cc: Probate Registers
Probate Court System Providers

FROM: Carl L. Gromek

RE: Revised Deficiencies in Fiduciary Administration Report (SCAO 65)

The Deficiencies in Fiduciary Administration Report (SCAO 65) has been revised and renamed to reflect the focus on administration of guardianships and conservatorships. Probate courts should continue to use the current SCAO 23, titled the Delinquent Fiduciary Report, for reports up to and including the second semiannual report of 2007. Probate courts should begin using the attached SCAO 65, titled Deficiencies in Guardianship/Conservatorship Administration Report, for the first semiannual report of 2008.

If you have any questions, please contact your regional administrator or Jean Mahjoory, Probate Courts Management Analyst, at 517-373-3769 or mahjooryj@courts.mi.gov.

Attachment

DEFICIENCIES IN GUARDIANSHIP/CONSERVATORSHIP ADMINISTRATION Complete semiannually and transmit no later than 30 days following the report date.		Report date June 30 _____ (year) December 31 _____ (year)
Preparer's name	Preparer's telephone no.	County

A: Summary Report of Cases

Line	CASE TYPE	CA	CY	DD	GA	GL	GM	LG
1	Active Cases							
2	Deficient Over 182 Days							

Line 1: For each case type, report the total number of open cases as of the report date.

Line 2: Of the cases reported in Line 1, report each case with a deficiency that existed for more than 182 days unless, before the report date, the deficiency was cured or a special or successor fiduciary was appointed. The day after a document was due, as prescribed by MCR 5.409, is the first day of a deficiency.

B: Detail Report of Deficiencies

For each case reported in Line 2, list the case number, the name of the fiduciary, the date of the deficiency, the type of deficiency, and the court action. If there is more than one deficiency for a case, list each deficiency on a separate line and in consecutive order. Documents that should be monitored for deficiencies are an inventory, an account, a report, and an annual verification of funds on deposit in a restricted account.

Line	Case No.	Name of Fiduciary	Date of Deficiency	Type of Deficiency	Court Action

I certify that on this date I reviewed this report.

_____ Date

_____ Chief judge signature