

# Management Plan

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PUBLIC GUARDIAN'S REF

PG/

DATE OF APPOINTMENT  
(As per Court Order)

## Adult

TITLE

SURNAME

FORENAME

OTHER NAMES

## Guardian

TITLE

SURNAME

FORENAME

OTHER NAMES

## Joint Guardian (If Applicable)

TITLE:

SURNAME:

FORENAME:

OTHER NAMES:

## Joint Guardian (If Applicable)

TITLE:

SURNAME:

FORENAME:

OTHER NAMES:

## Section 1 - Needs of the Adult:

DOES THE ADULT HAVE REGULAR LIVING EXPENSES?

YES – Please complete Section 1A

NO – Please go to Section

### SECTION 1A - REGULAR LIVING EXPENSES

ITEM		AMOUNT PER MONTH £
Gas		
Electricity		
Telephone		
TV Licence		
Mortgage	Rent (Please select)	
Insurances		
Council Tax		
Care Charges		
Loan Repayments		
Subscriptions		
Food and Household Expenses		
Clothing		
Holidays		
Other (Please specify)		

TOTAL AMOUNT PER MONTH £

# Section 2 - Heritable Assets

DOES THE ADULT OWN HERITABLE PROPERTY?

YES – Please complete Section 2a

NO – Please go to Section 3

## SECTION 2A - ADDRESS DETAILS

Please provide the address details of all properties.

## SECTION 2B - INTENDED USE

What is the intended use of the heritable property?

# Section 3 - Proposed method of Investment / Disposal of Moveable Assets

## DOES THE ADULT HAVE ANY MOVEABLE ASSETS?

YES – If total of Moveable Assets is under £25,000 please complete Section 3A detailing proposals then please go to Section 5

OR If total of Moveable Assets is in excess of £25,000 please complete Section 3B detailing proposals then go to Section 4

NO – Please go to Section 5

## SECTION 3A - MOVEABLE ASSETS UNDER £25,000

In order to maintain the adult's lifestyle and expenditure as appropriate and maximise the return from his/her income and investments, it is proposed to:

## SECTION 3B - MOVEABLE ASSETS IN EXCESS OF £25,000

In order to maintain the adult's lifestyle and expenditure as appropriate and maximise the return from his/her income and investments, it is proposed to:

## Section 4 - Financial Advice

IF ADULT'S MOVEABLE ASSETS ARE IN EXCESS OF £25,000 HAVE YOU SOUGHT PROPER FINANCIAL ADVICE?

YES Go to Section 4A

NO Go to Section 4C

### SECTION - 4A

Is a copy of the advice enclosed.

YES tick box and go to Section 5

NO Go to Section 4B

### SECTION 4B

Please send a copy of the advisor's report to this office.

Now go to Section 5

### SECTION 4C

Please arrange for advice to be sought and a copy of the advisor's report to be sent to this office.

Now go to Section 5

## Section 5 - Tax Planning Proposals

DO YOU HAVE ANY TAX PLANNING PROPOSALS?

YES – Please complete Section 5A

NO – Please go to Section 6

### SECTION 5A - TAX PLANNING PROPOSALS

(Please note this must be in line with the wishes of the adult as far as they can be ascertained and Inland Revenue Guidelines)

# Section 6 - Proposals for Provision of Gifts e.g. Birthday, Anniversary, Christmas etc.

DO YOU HAVE ANY PROPOSALS FOR THE PROVISION OF GIFTS?

YES – Please complete Section 6A

NO – Please go to Section 7

## SECTION 6A - PROPOSALS FOR GIFTS

NO OF RECIPIENTS	PURPOSE	AMOUNT	FREQUENCY	ANNUAL AMOUNT

TOTAL ANNUAL GIFTS £

# Section 7 - Other Proposals

ARE THERE ANY OTHER PROPOSALS THAT YOU WISH TO INCLUDE?

YES – Please complete Section 7A

NO – Please go to Section 8

## SECTION 7A - OTHER PROPOSALS

# Section 8 - Proposals for Contact with Adult and/or any other relevant persons

(Note that Code of Practice advises it is good practice to have two review meetings with the adult annually)

## Signature of Financial Guardian(s)

(Please note where more than one financial guardian is appointed all require to sign and date below)

FINANCIAL GUARDIAN	<input type="text"/>	DATE	<input type="text"/>
FINANCIAL GUARDIAN	<input type="text"/>	DATE	<input type="text"/>
FINANCIAL GUARDIAN	<input type="text"/>	DATE	<input type="text"/>

THE FORM IS NOW COMPLETE, PLEASE PRINT IT AND SEND IT TO:

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