CHAMBERS OF
**CIRCUIT JUDGE**
THIRTEENTH JUDICIAL CIRCUIT
TAMPA, FLORIDA 33602

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HILLSBOROUGH COUNTY
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**TO:** Hillsborough County Professional Guardians and Attorneys
**FROM:** Hon. Claudia Rickert Isom, Administrative Judge
Probate, Guardianship & Trust Division
**DATE:** January 22, 2010
**SUBJECT:** Guardian Fee Workgroup Report Approval

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I am pleased to announce that Chief Judge Manuel Menendez has reviewed and approved the Final Report of the Guardian Fee Workgroup. The workgroup recommended an increase in guardian fee rates, and also an adjustment to the rate schedule, which has been and will continue to be based on a guardian's years of experience. Most Workgroup members felt there was enough flexibility in the current guidelines pertaining to billing procedures, and no changes were recommended in that regard.

The new rates, to be effective **January 20, 2010,** are as follows:

$45.00 per hour for new guardians, until their third anniversary
$60.00 per hour after the third anniversary, until the fifth anniversary
$75.00 per hour after the fifth anniversary

Upon petition of the guardian or upon the court's own initiative, the court retains the discretion to adjust hourly rates higher or lower for each professional guardian (individually), as deemed appropriate by the court. For purposes of determining years of experience, the court recognizes a guardian as "professional" when they have been appointed to three or more non-relative wards.

Any questions regarding implementation of the new fee structure should be directed to Jennifer Branch at the Elder Justice Center, 813-276-2726, or Magistrate Sean Cadigan, at 813-276-8517.

# Thirteenth Judicial Circuit Guardian Fee Workgroup

## FINAL REPORT

## August 3, 2009

The 13th Judicial Circuit Guardian Fee Workgroup was established based on a request from Judge Claudia R. Isom. Noting that the last workgroup met in 2004, approximately five years ago, Judge Isom wanted to form a group, to take a look at what progress has been made since the 2004 workgroup met, and to see if there were any new issues that need to be addressed by the Court.

Workgroup members are: Magistrate Sean Cadigan, Jennifer Branch, Tamara Cribben, DeeWynn Cox, Lona DiCerb, Jill Giordano, Julie Goddard, Julia Kite-Powell, Shelley Mirpuri, Henry Nobles, Joe Ellen Rowe, Teri St. Hilaire, Russell Shenk, Douglas Stalley, Russell Winer, and Nicole Woodard.

The workgroup met on April 24 and June 5, 2009. The workgroup submits the following recommendations to Judge Claudia R. Isom:

### Stipend:

The idea of a stipend, paid to a professional guardian at the time of their appointment, was presented to the workgroup. As many guardians pointed out, there is a considerable amount of work to be done, when a guardianship is established. Current guidelines allow for a professional guardian to petition for fees after three months, but not many guardians are currently doing this. Some members appeared to be in favor of a stipend, but no consensus was reached, as to a reasonable amount, or whether most guardians would be in favor of a stipend. Currently, there are no circuits in Florida, which allow a stipend.

This issue should be explored further, as a separate project.

### Change in Guardian Fee Rates:

A statewide fee survey was conducted. Guardian fees across the state vary from $40.00 per hour, to as high as $150.00 per hour. Many circuits have varying rates, depending on the guardian's level of experience, and the complexity of the case. One circuit establishes the guardian's rate of pay, depending on the percentage of pro bono cases they carry.

Most workgroup members felt an overall increase in guardian rates of pay is warranted. Most also believed that the timeframes that separate the pay rates should be narrowed. Some concern was raised over the proposed pay increase, given the current economic climate.

The following pay scale was proposed:

| | |
|---|---|
| Years 1 through 3 | $50.00 per hour |
| Years 3 through 5 | $65.00 per hour |
| Over 5 years | $80.00 per hour |

A more modest increase should also be considered:

| | |
|---|---|
| Years 1 through 3 | $45.00 per hour |
| Years 3 through 5 | $60.00 per hour |
| Over 5 years | $75.00 per hour |

Currently, in this circuit, we have the following number of guardians in each pay scale, with the majority of guardians on the low end of the scale:

| | |
|---|---|
| $40.00 per hour (One to five years) | 7 guardians |
| $55.00 per hour (Five to ten years) | 6 guardians |
| $70.00 per hour (Over ten years) | 3 guardians |

With the proposed "narrowing" of the experience required between pay scales, the numbers would shift, as indicated below:

| | |
|---|---|
| One to three years | 4 guardians |
| Three to five years | 3 guardians |
| Over five years | 9 guardians |

**Ward Visitation/Billing for Visits:**

In general, professional guardians should visit monthly. If more frequent visits are required, the professional guardian should explain, in his or her billing entry description, why the extra visit was necessary, and describe how the visit benefitted the ward. If a guardian chooses to use a companion service for social visits to the ward, guardians should check to see if the agency requires a minimum time (e.g. two hour minimum), and if the hourly charge is less than the guardian's rate of pay.

No changes to existing policy are recommended.

**Banking Issues/Direct Deposit:**

Currently, professional guardians are strongly encouraged to have all of a ward's monthly income directly deposited. Of course, there are occasions when a direct deposit is not possible. Guardians have been asked to give detail on a fee petition, or in the billing statement, if they have to deposit a check that could not be directly deposited (e.g. refund check). Guardians occasionally also have to conduct banking business in person, at a branch office. Guardians should offer a more detailed description of the duties performed, to show the court that the visit was necessary, and in the ward's best interest.

No changes to existing policy or procedure are recommended.

### Doctor Visits:

It was agreed that guardians must attend certain appointments with their wards, especially visits to new doctors, or specialists. It is usually not necessary for the guardian to attend routine appointments with an established physician. Historically, guardians have been encouraged by the court, to have a companion or caregiver accompany the ward to those visits, where the guardian's presence was not required.

Workgroup members agreed that the guardian should offer details for any appointment he/she attends with the ward. Generally speaking, entries that have a high level of detail, or justification as to why the guardian had to attend the appointment, have not been reduced by the court.

No changes to existing policies are recommended.

### Monthly Caps for Bill Pay/Clerical/Shopping:

The 2004 Guardian Fee Workgroup recommended the following caps on certain billable guardian duties:

| | |
|---|---|
| *Bill paying* | *2 hours per month* |
| *Shopping* | *2.5 hours per month if ward at home, 1 hour per month, if ward in a facility* |
| *Clerical* | *1 hour per month* |

The 2004 Workgroup agreed that these monthly caps could be exceeded, if an explanation was included.

Some members voiced a desire to eliminate the caps, stating that professional guardians have sufficient training and knowledge to meet the needs of their wards, and that monthly caps on certain duties are unnecessary, and should be eliminated. After discussion, most members showed support for leaving the caps in place, with the understanding that the caps can be exceeded, if a reasonable explanation is provided to the court.

No changes to existing policies are recommended.

## CONCLUSION

It is respectfully requested that the Court consider the workgroup recommendation as to a possible guardian rate increase at this time.

# Joint Circuit Workgroup on Guardian Fees

A Collaborative Effort of Florida's Sixth and Thirteenth Judicial Circuits

## REPORT

**To:** Honorable Susan Sexton, Administrative Judge, Probate/Guardianship - 13th Circuit
Honorable Ray E. Ulmer, Jr., Administrative Judge, Probate/Guardianship - 6th Circuit
Honorable George W. Greer, Probate/Guardianship – 6th Circuit

**From:** Joint Circuit Workgroup on Guardian Fees
Sean Cadigan - 13th Circuit Contact
Keela Samis - 6th Circuit Contact

**Date:** December 6, 2004

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The Joint Circuit Workgroup on Guardian Fees was established based on a request from Michael Bridenback, Court Administrator for the Thirteenth Judicial Circuit. Mr. Bridenback, citing the different requirements for guardians filing of fee petitions among various jurisdictions and noting that professional guardians practices in the Sixth and Thirteenth Judicial Circuits, requested the Workgroup recommend guidelines to the Administrative Judges.

Workgroup members are: Sean Cadigan, Keela Samis, Pam Campbell, Thomas Tripp, Carolyn Dempsey, Alison Carpenter, Tamara Cribben, Sharon Van Wart, Marcia Larkin, Faith Dunne, Robert Hines and Henry Nobles.

The Workgroup met on August 27 and October 1, 2004. The Workgroup submits the following recommendations to the Administrative Judges Susan Sexton and Ray E. Ulmer, Jr.:

**Experienced Based Fee Proposal, with Proposed Rules to Address Fee Inequities**

This proposal is a basic fee structure primarily based on years of experience. The Workgroup recommends the following hourly fee rates:

Professional Guardians with 0-5 years (60 months) are entitled to bill at a rate of $40.00 per hour.
Professional Guardians with 6-9 years of experience are entitled to bill at a rate of $55.00 per hour.
Professional Guardians with 10 or more years are entitled to bill at a rate of $70.00 per hour.

Upon petition of the guardian or upon the court's own initiative, the court retains the discretion to adjust hourly rates higher or lower for each professional guardian (individually), as deemed appropriate by the court.

**Elimination of the Guardian Versus Clerical Fee Distinction**

The Workgroup recommends the elimination of the guardian versus clerical distinction because review of such petitions is unduly burdensome. Nonetheless, this recommendation suggests that reasonable steps must be taken in order to avoid potential fee inequities that would likely result from the elimination of clerical/guardian distinction. Therefore, the Workgroup recommends written rules/guidelines to address particular billing issues that include bill paying, travel, shopping, copying/faxing/filing, and arranging transportation and appointments, as well as attendance at appointments.

The Workgroup members agreed on the following rules/guidelines:

Bill paying - Fees shall not exceed two hours of billable time (at the applicable rate) each month for bill paying without providing a written justification. If more than two hours, the guardian is given the opportunity, if faced with some extraordinary circumstances, to provide justification for seeking higher fees than the court would normally believe to be appropriate in an average month.

Travel - Guardians would be entitled to bill travel time, but not mileage. Guardians may, of course, seek deductions of their actual mileage on their income tax returns. The group recommends, however, that guardians be required to list their actual mileage per trip, with each line-item billing entry for travel time. This will provide the court the ability to assess whether the travel time charged was reasonable.

Guardians traveling from outside of the county where the court is located will only be compensated for travel time from the court's county line.

Shopping - The Workgroup recommends imposing two standard "per-month" fee caps by rule, allowing for exceptional circumstances.

*Ward in home:* Cap of 2.5 hours per month
*Ward in facility:* Cap of 1.0 hour per month

Guardians would be permitted to provide a detailed explanation justifying fees for shopping in excess of the fee cap guidelines. An example of when it may certainly be appropriate to exceed those caps/guidelines would be in the month of December, due to holiday shopping. Additionally, the guidelines associated with the rules should explain that, when possible, guardians should attempt to get the ward's companion(s) to perform these services. It is not in the best interest of the ward to have a guardian charge $70.00 per hour to run to the store for milk and bread. Caretakers may be allotted a small amount of cash each month for this purpose, with the requirement that they provide receipts to the guardian to account for that cash.

The Workgroup also recommends that guardians be authorized to reimburse themselves up to $20.00 per month for purchases made for the ward, without a court order - so long as receipts are maintained to back up the expenditures.

Arranging Transportation, Appointments & Services for the Wards and Attendance at Appointments - While it would not be appropriate to try to impose a cap in this category, it would be appropriate to set forth some guidelines in the Rules that would help to avoid fee inequities in this area as a result of the elimination of billing at a clerical rate.

Guardians should be advised to be mindful that arranging transportation and appointments is something that could be done by clerical staff (such staff were utilized), and, therefore, does not really require the fiduciary expertise of a professional guardian. Fees for such services should be kept at a minimum and anytime that billing in this regard covers a substantial amount of time, a detailed explanation should be provided.

With regard to attendance at appointments, guardians should be encouraged to utilize companions for routine visits, such as dental cleanings and eye exams. Certainly, whenever a guardian must be present to meet with a provider or otherwise exercise some fiduciary duty, billing guardian time is appropriate. If, however, a guardian can avoid lengthy periods of time where they are simply waiting in a doctor's office with the ward or attending a funeral or family function with a ward, efforts should be made to do so. Guardians should be encouraged to enlist help in this regard whenever possible.

Recognizing that some hired companions charge a minimum amount of hours, if it would cost less to have the guardian attend such a function with the ward than it would to hire the companion for that minimum period that actually exceeds the time needed, then, in that event, the guardian should provide a brief statement explaining that in the fee statement.

Copying/Faxing/Filing

Billing related to this activity should be limited to 1.0 hour per month, without a written explanation in the fee petition – explaining any extraordinary circumstances that may justify higher billing in this category.

**Frequency of filing fee petitions**

Fee petitions should never be filed less than once a year.
The guardian may file the first petition may be filed at the three or six month mark, so long as the Inventory has been filed, and then one would be filed every six months thereafter.
Fees should not be approved unless the Inventory was filed and has been approved.
If a guardian is unable to timely file the Inventory, due to circumstances beyond his/her control, a petition for an extension and a proposed order should be filed with the Court *prior* to the deadline. Additionally, subsequent fee petitions would not be approved if an accounting is delinquent (without a court-ordered extension) or until the accounting has been approved.

**Multiple Wards (Husband & Wife or Sibling Group)**

When a guardian conducts one billable activity that is for the benefit of more than one related ward, the guardian should divide the billing equally between all three fee petitions. However, in a situation where that is not possible - where, for example, the billable time is only 1/10th of an hour and not divisible for billing purposes, the guardian should bill only one ward and keep track of such billing. In that way, the next time that situation comes up with the same husband and wife or the same sibling group, the guardian can make sure that the ward who was billed the last

time is not billed again. The guardian should essentially take turns billing the wards in this situation - so as to be as equitable as possible.

**Agency Guardians**

Agency guardians may bill fees for discussing a ward at an internal agency staff meeting. And such billing should be reasonable and any extraordinary amount of billing in that regard should be accompanied by written justification - demonstrating the exceptional circumstances.

**Case Specific Reductions**

At the Court's discretion and after the guardian has been given an opportunity to be heard, the Court may reduce a guardian's fees due to a guardian's individual failures to meet his/her statutory or court-ordered responsibilities. A history of repeated non-compliance may result in a reduction of the guardian's fee rate. However, individual instances of non-compliance may also be appropriate for one-time reductions in fees, as opposed to a permanent rate reduction.

Examples of such non-compliance are:
•late filings
•failure to notify the Court of the ward's relocation
•failure to notify the Court of the current address and telephone number of the guardian
•failure to provide required copies of documents/pleadings to all interested parties, including the ward, when applicable
•failure to timely close the guardianship
•failure to properly transfer the guardianship to the appropriate jurisdiction

None of the Workgroup members expressed any objections in this regard and such language should be included in any proposed guidelines.

**Mandatory Pro Bono Reporting Requirements**

The professional guardians should be required to provide a current list of case names and case numbers on an annual basis, specifically designating which cases are pro bono cases. Guardians should be directed to satisfy that requirement by filing a new Application for Appointment as Guardian annually or filing a List of Cases annually with the court. The Court will benefit from knowing how many cases a guardian has active on a pro bono basis. Such information could be considered in evaluating any requests for deviation from the standard experienced based fee rates and would assist the court in finding successor guardians when necessary. In this way, the court can avoid asking an already burdened guardian, who has a high number of pro bono cases, to accept a pro bono case.

**Procedural Rules**

1. The fees and costs awarded to date are to be in the petition and order. Time periods covered are to be stated in the petition and order. An amended petition or new order will be required if the petition or order omits these requirements.
2. Petitions for fees are to include an itemized statement of services, expenses, and the rate charged for services.
3. Notices to, or signature of, guardian of the property and/or the Veterans Administration must be submitted with the petition for fees when applicable.
4. Proposed orders for fees are to include blank spaces and the court will fill in the amounts.
5. The itemization of services shall be listed in chronological order.
6. Billing is to be done in tenths of an hour.
7. Calls to and from the clerk, the administrative staff of the court, the general magistrate's assistant or the judicial assistant for issues relating to guardian error should not be billed.
8. Non-substantive cover letters to the clerk should not be billed.
9. Time spent to review orders/instruction from the court resulting from the guardian's failure to file documents on a timely basis or otherwise meet court-ordered or statutory obligations, and work to produce amended documents as a result of such non-compliance, shall not be billed.

## CONCLUSION

We respectfully submit the above recommendations for your review and approval. With your approval, Sean Cadigan and Keela Samis will draft a proposed administrative order to implement the new fee structure and rules. The proposed administrative order will then be sent to our respective Chief Judges for their consideration. That process will involve Court Counsel for each Circuit reviewing the proposal and making a recommendation to the Chief Judge(s).

Finally, the Workgroup determined that our courts would benefit from the development of form fee petitions and form logs, including common language that would be universally accepted and recognized in each Circuit. The Workgroup intends to continue working in that regard as a separate project.

Thank you for your consideration of our Report.

# MEMORANDUM

**TO:** Hillsborough County Professional Guardians

**FROM:** General Magistrate Sean Cadigan

**RE:** Guardian Fee Changes

**DATE:** December 29, 2004

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I hope that you have all enjoyed a safe and happy Holiday Season. I would like to thank each of you for your hard work on behalf of the wards of this court. It has been my pleasure, since coming into the Division in February, to get to "know" our local guardians, through reviewing your guardianship files and your participation in hearings or administrative projects involving guardianship.

Those of you who attended my meeting with our professional guardians, at the courthouse back in June, might remember me talking about forming a joint circuit workgroup with members from Pinellas and Hillsborough Counties to address guardian fees and procedures. Some of you also know that your local chapter of the Florida Statewide Guardianship Association had written Judge Sexton to ask her to consider a change in the prevailing guardian fee schedule, including a rate increase. I am happy to report that the workgroup was formed and it has made significant progress with regard to this issue.

I have enclosed , for your perusal, a copy of the written report from this Joint Circuit Workgroup on Fees. As you will see, professional guardians from both circuits and guardianship attorneys actively participated in the efforts of the Workgroup. This Report was delivered to the administrative judges for both circuits; and while Pinellas County expects to obtain approval by the end of January, Judge Sexton has already reviewed the Workgroup's recommendations and has approved an informal implementation, effective January 1, 2005. We will be seeking an administrative order from our Chief Judge to formalize the policies and procedures and to make it a part of the official records for our Circuit. However, Judge Sexton strongly supports the recommended changes, which includes a raise for our most experienced guardians and an elimination of the two-tiered "guardian" versus "clerical" billing structure. It is anticipated that these changes will help expedite the review of the fee petitions and, as a result, the Judge indicated that she would agree to apply the new policies and procedure for guardian activity occurring on or after January 1, 2005. Guardian activity conducted

through the end of 2004 must be submitted under the old system and will be reviewed using that two-tier fee schedule.

Please take some time to review the enclosed Report and familiarize yourself with the changes. Should you have any questions, please feel free to contact me at 276-8517 or you may call Marcie Larkin, from the Elder Justice Center, at 276-2726.

As you will see, the new fee schedule is based on the number of years of experience that a professional guardian has. However, you are afforded the opportunity to request that Judge Sexton, as Administrative Judge for the Division, review your hourly rate for a possible increase. For example, a guardian with only four years of experience may have taken on a particularly high volume of cases, including *pro bono* guardianships, and may have experience handling particularly complicated matters or some other educational background or experience that may justify the Court modifying the standard fee rate. If you feel that you fit in such a category and wish for your rate to be evaluated further, it will be necessary for you to submit a detailed written request to the Court. Until further notice, such requests should be submitted to the Court's Elder Justice Center for processing. The request should set forth all the factors that you believe support an increase in your hourly rate and should include substantiating documents when appropriate. How much or how little you submit will be your choice, but the professional guardian has the burden of convincing Judge Sexton that a modification is warranted, as the ultimate decision in this regard will be hers as the Administrative Judge for the Division.

Once Pinellas County has obtained their Administrative Judge's approval, we will be working on proposed "matching" administrative orders that will set forth the specifics as clearly as possible in each Circuit. In the meantime, rely on the details of the enclosed Report and ask questions as necessary. It is my sincere hope that these changes will achieve fair results for both our wards and our professional guardians and will make the fee process much less cumbersome, thereby enabling the turn-around-time for approval to be much quicker. The Workgroup intends to continue exploring the possibility of developing a form petition for your use, with standard language or codes that could even further expedite the review process and avoid some of the misunderstandings that have occurred in the past, simply because we had different guardians billing the same types of activities in different ways or with varying and sometimes confusing descriptions.

Please accept my sincerest wishes for a New Year filled with good health and happiness.

SOC/ms

Copies to: Honorable Susan Sexton, Administrative Judge
Marcia Larkin, Esq., Elder Justice Center

ADMINISTRATIVE OFFICE OF THE COURTS
**GENERAL MAGISTRATE**
THIRTEENTH JUDICIAL CIRCUIT OF FLORIDA

SEAN O. CADIGAN

PROBATE GUARDIANSHIP AND TRUST

# MEMORANDUM

TO: Hillsborough County Professional Guardians

FROM: General Magistrate Sean O. Cadigan SOC

RE: Filing Guardian Fee Petitions Implementing Approved Changes

DATE: February 9, 2005

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I am writing in an effort to further clarify some issues that will affect the filing of guardian fee petitions. As you know, Judge Susan Sexton has approved an implementation of the new procedures for guardian fees that were established through our joint circuit workgroup with members from Pinellas and Hillsborough counties. A copy of the written report from the Joint Circuit Workgroup on Fees, outlining the new procedures, was provided as an attachment to the previous Memorandum that I sent you in December of last year. As previously indicated, the effective date of these changes was January 1, 2005. This means that guardian activity occurring on or after January 1, 2005 will be subject to the new policies and procedures for reviewing fee petitions, as outlined in the written report from the Joint Circuit Workgroup on Fees.

While there will undoubtedly be a transition period as a result of the implementation of these new policies and procedures, please be advised that your time frame for submitting guardian fee petitions should not change; rather, your next fee petition should be filed as it normally would, six months after the last petition was submitted. In doing so, you will most likely find that you incurred guardian fees and costs both before January 1, 2005 and also after January 1, 2005 within the same fee petition period. Since the new policies and procedures for reviewing guardian activity are effective as of January 1, 2005, please note that any guardian activity submitted in your next fee petition that covers activity prior to January 1, 2005, must be submitted according to the former bi-level billing requirements (distinguishing clerical from guardian related duties) together with the approved $60/hour for guardian duties and $25/hour for clerical duties. Then, you should subtotal hours and fees/costs for the guardian activity occurring prior to January 1, 2005. Next, any guardian activity submitted in that same fee petition for

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activity on or after January 1, 2005 must be submitted in accordance with the implemented changes as they pertain to you respectively. After detailing this information, please subtotal the hours and fees/costs for the guardian activity on or after January 1, 2005. Please do not file two separate fee petitions to achieve this result. By including all six months of guardian activity in this fashion, the court will be able to effectively and efficiently transition into implementing the new policies and procedures. We realize that this will complicate the preparation of the fee petition, but please remember that it will only substantially affect that one period.

In addition, the fee narrative/itemized statement of account attached to petitions for fees regarding guardian activity on or after January 1, 2005, will need to include information in a format that will make review of the request efficient. Due to the elimination of the guardian versus clerical distinction, the new changes include certain safeguards to avoid potential fee inequities in the following categories:

| | |
|---|---|
| 1) Bill paying related activity | 2.0 hours per month maximum, without detailed explanation |
| 2) Shopping related activity | |
| a) Ward resides in home | 2.5 hours per month maximum, without detailed explanation |
| b) Ward resides in facility | 1.0 hours per month maximum, without detailed explanation |
| 3) Clerical related activity (e.g. filing, faxing, copying) | 1.0 hours per month maximum, without detailed explanation |

For each line-item entry that fits into a safeguard category, you must identify the specific safeguarded category in which the line-item belongs. To do so, it will be necessary to place, to the left or to the right of the description, a letter "B" to represent a bill paying entry, a letter "S" to represent a shopping related entry, and a letter "C" to represent a clerical related activity. Additionally, within the fee narrative/itemized billing statement, a subtotal for each of these safeguard categories shall be provided at the end of ***each month***. To illustrate, an example has been provided as an attachment to this Memorandum *(See Attachment A)*. Your cooperation is critical to ensure that petitions will be considered promptly under the new policies and procedures. We realize that this requires a modest additional effort on your part in preparing your fee petitions. But, by providing the information in this manner, it will significantly facilitate the court's review of the reasonableness of the services provided. It is anticipated that adherence to these new procedures will dramatically reduce the turnaround time for fee approval.

Other safeguards, in addition to those provided in this Memorandum, are also implemented within the new changes which must be followed. Those safeguards are referenced in the written report from the Joint Circuit Workgroup on Fees, to wit: regarding travel vs. mileage and arranging transportation/appointments/attendance at appointments. While these

safeguards to not have specific caps set, they should nonetheless be taken into consideration when completing the fee narrative/itemized account.

As we enter into this transition phase together, it may be necessary to periodically make adjustments in order to give full force and effect to the new policies and procedures. For this, I thank you in advance for your continued consideration and support. Please know that our collaborative efforts will better serve the Ward, as well as you as the guardian, and also the court by ensuring that your petitions for fees are fairly and promptly considered. If you have any questions concerning the new guardian fee changes or any information contained in this Memorandum, you are welcome to contact me at (813) 276-8517 or Marcie Larkin at the Elder Justice Center at (813) 276-2726. I, again, thank you for your continued efforts as we move forward on this issue together.

ATTACHMENT

***NOTE**: In this example, fees are assessed at a guardian rate of $55.00 per hour.*

| Date of Service | | Description of Services | Hours | Amount |
|---|---|---|---|---|
| 1/1/05 | *B | Write checks to TECO for monthly payments. | .1 | $5.50 |
| 1/12/05 | *C | Fax copies of court order to Ward's doctor and file copy of fax confirmation. | .1 | $ 5.50 |
| 1/15/05 | | Spoke with Ward's doctor re: fax, contents of order, and status of Ward. | .2 | $11.00 |
| 1/16/05 | *B | Write checks to Verizon, and City of Tampa Utilities for monthly payments. | .2 | $11.00 |

| Subtotals: | | | | |
|---|---|---|---|---|
| | Bill paying | .3 hours | $16.50 amount | |
| | Shopping | _____ hours | _____ amount | |
| | Clerical | .1 hours | $5.50 amount | |

| | | | | | |
|---|---|---|---|---|---|
| 2/2/05 | | Attend quarterly care plan meeting re: Ward. | 2.0 | $55/hr | $110.00 |
| 2/6/05 | *S | Bought three (3) nightgowns for Ward at Wal-Mart with miscellaneous toiletries | .5 | $55/hr | $27.50 |
| 2/8/05 | | Visit Ward at facility and delivered nightgowns and toiletries purchased. | 1.0 | $55.00 | $55.00 |

| Subtotals: | | | |
|---|---|---|---|
| | Bill paying | _____ hours | _____ amount |
| | Shopping | .5 hours | $27.50 amount |
| | Clerical | _____ hours | _____ amount |