

[Your Name/Law Firm Name]
[Address]
[City, State, Zip Code]
[Phone Number]
[Email Address]

[Date]

[Guardian Ad Litem Name]
[Address]
[City, State, Zip Code]

RE: In the Matter of [Ward's Full Name]

Case Number: [Case Number]

Subject: Formal Instructions for Asset Protection and Estate Review

Dear [Guardian Ad Litem Name],

Pursuant to your appointment as Guardian Ad Litem (GAL) for [Ward's Name], this letter serves as formal instruction regarding the necessary review of the Ward's estate and the implementation of asset protection strategies.

To ensure the long-term financial security of the Ward and the preservation of their interests, you are requested to perform the following actions:

1. Comprehensive Asset Inventory

Conduct a full audit of all real property, liquid assets, retirement accounts, and personal property currently held by or on behalf of the Ward.

2. Review of Existing Estate Planning Documents

Examine any existing Wills, Trusts, Powers of Attorney, or Healthcare Directives to ensure they reflect the Ward's current best interests and legal capacity.

3. Asset Protection Analysis

Evaluate the vulnerability of the Ward's assets to potential creditors, tax liabilities, or long-term care costs. Please provide recommendations on the suitability of establishing or amending a Special Needs Trust or other protective legal vehicles.

4. Benefits Eligibility Assessment

Review how current asset holdings may impact the Ward's eligibility for government benefits, including Medicaid and Social Security, and suggest restructuring if necessary.

5. Verification of Fiduciary Oversight

Confirm that any current guardians or conservators of the estate are acting in accordance with their fiduciary duties and that all court-ordered bond requirements are met.

Please provide a preliminary report of your findings and any proposed motions to the court by [Insert Date]. If you require access to specific financial records or wish to interview family members, please contact my office immediately to facilitate these arrangements.

Thank you for your diligent service to the Ward.

Sincerely,

[Your Signature]

[Your Printed Name]

[Your Title/Relationship to Case]