

Information for guardians

CHECK LIST – record keeping

If you have **authority for financial decisions**, you will need to keep good records of what you spend for the adult you represent and any income they get. You will need to work closely with any other guardians or people involved in the adult's care, and check if the adult has funds available before you approve any possible expenses.

You will need to provide a **Financial Statement (Form AG10)** to the Northern Territory Civil and Administrative Tribunal when the Guardianship Order is reassessed.

Things you buy or pay for the adult, such as:

- Receipts for anything you buy for the adult** (e.g. food, clothing, shoes, entertainment)
- Receipts for any bills you pay for the adult** (e.g. accommodation, telephone/broadband, power, water and gas, memberships or clubs)
- Property-related bills you pay for the adult** (e.g. rates, mortgage or loan repayments)
- Credit card / bank statements for the adult and you**, depending how you pay for things
- Health-related bills** (e.g. medical or dental visits, specialist appointments, allied health providers such as podiatrists, physiotherapists, occupational therapists, prescription and off the shelf medicines, prescription eye glasses, health insurance)
- Receipts for any other expenses listed in the Guardianship Order** as things you can pay for and claim.

Income or money the adult gets, such as:

- Pension or other government benefits (Australia or overseas)
- Income from paid work done by the adult
- Income from a business or other enterprise in which the adult has an interest (including sale of artworks or other property)
- Superannuation or investment income (e.g. bank interest, share dividends, rental income)

It is important that you keep a record of any correspondence, decisions or payments for:

- Centrelink (including pensions and benefits and Child Support)
- National Disability Insurance Scheme
- Department of Veterans' Affairs
- Medicare and other health-related costs and reimbursements
- Australian Taxation Office
- Banks / building societies / credit unions / credit card providers / other financial institutions
- Accountants and lawyers (if the adult has one)
- Any business, company or enterprise in which the adult has an interest
- Superannuation fund(s) / fund manager(s)
- Insurance providers (e.g. property, house, vehicle)
- Communications providers (fixed line telephone / mobile phone / broadband)
- Power and water providers (electricity, gas, water).

This is an example of what a simple income and expenditure record might look like for the months May–October.

Income received by adult	Jan (\$)	Feb (\$)	Mar (\$)	Apr (\$)	May (\$)	Jun (\$)	Jul (\$)	Aug (\$)	Sep (\$)	Oct (\$)	Nov (\$)	Dec (\$)	\$Total
Disability Support Pension					1616	1616	1616	1616	1616	1616			9696
Paid work (employment)													
Investments (shares etc)													
Income from rental properties													
Interest on bank accounts					5	5	5	5	5	5			30
Superannuation income													
Other (specify)													
TOTAL (= A)					1621	1621	1621	1621	1621	1621			9726

Expenses for adult	Jan (\$)	Feb (\$)	Mar (\$)	Apr (\$)	May (\$)	Jun (\$)	Jul (\$)	Aug (\$)	Sep (\$)	Oct (\$)	Nov (\$)	Dec (\$)	\$Total
Power and water													
Telephone/broadband					66	66	66	66	66	66			396
Insurance (house)						900							900
Accommodation (rates)					200				200				400
Memberships (pool, gym)													
Personal items (e.g. clothing, personal hygiene items etc)					150	100	30	20	50				350
Entertainment (e.g. outings, movies, travel for the adult)						20	20	20					60
Home help (Council/Shire)					50	50	50	50	50	50			300
TOTAL (= B)					466	1136	166	156	366	116			2406

TOTAL PROFIT OR LOSS (= A – B)					1155	485	1455	1465	1255	1505			7320
---------------------------------------	--	--	--	--	-------------	------------	-------------	-------------	-------------	-------------	--	--	-------------

Note: Record what you spent/received for the adult under the month it happened. All expenses must relate to what the Guardianship Order says you can do.