

2023 South Dakota Legislature

House Bill 1240**AMENDMENT 1240A
FOR THE INTRODUCED BILL**

1 **An Act to amend provisions addressing guardianships and conservatorships.**

2 BE IT ENACTED BY THE LEGISLATURE OF THE STATE OF SOUTH DAKOTA:

3 **Section 1. That § 29A-5-304 be AMENDED:**

4 **29A-5-304.** Any individual who has sufficient capacity to form a preference may
5 at any time nominate any individual or entity to act as his guardian or conservator. The
6 nomination may be made in writing, by an oral request to the court, or may be proved by
7 any other competent evidence. A person designated under a validly executed power of
8 attorney by the ~~protected~~ person alleged to be in need of protection ~~may~~ must be
9 considered as a nominee. The court shall appoint the individual or entity so nominated if
10 the nominee is otherwise eligible to act and would serve in the best interests of the
11 protected person. If a person designated under a validly executed power of attorney by
12 the person alleged to be in need of protection is not appointed as the guardian or
13 conservator, the court must issue written findings of facts and conclusions of law as to
14 why the designated person was not appointed.

15 In the absence of an effective nomination by the protected person, the court shall
16 appoint as guardian or conservator the individual or entity that will act in the protected
17 person's best interests. In making that appointment, the court shall consider the proposed
18 guardian's or conservator's geographic location, familial or other relationship with the
19 protected person, ability to carry out the powers and duties of the office, commitment to
20 promoting the protected person's welfare, any potential conflicts of interest, and the
21 recommendations of the spouse, the parents or other interested relatives, whether made
22 by will or otherwise. The court may appoint more than one guardian or conservator and
23 need not appoint the same individual or entity to serve as both guardian and conservator.

24 **Section 2. That § 29A-5-309 be AMENDED:**

1 **29A-5-309.** The court shall appoint an attorney for the person alleged to need
2 protection, either upon the filing of the petition or at any time thereafter, if requested by
3 the person alleged to need protection, if the person expresses a desire to contest the
4 petition, or if the court determines that an appointment is otherwise needed to protect
5 the person's interests. In appointing an attorney, the court shall consider any known
6 preferences of the person alleged to need protection.

7 If the person alleged to need protection is not or will not be represented by an
8 attorney, the court shall either appoint a court representative to make an investigation
9 and recommendation concerning the relief requested in the petition; or shall order the
10 person alleged to need protection to attend the hearing on the petition.

11 If the basis of the petition is that the person alleged to need protection is an
12 absentee, the court shall appoint an attorney if the court determines that an appointment
13 is needed to protect the person's interests, but the court need not appoint a court
14 representative or order attendance at the hearing.

15 A person alleged to need protection who is contesting a petition may have an
16 evaluation done by a physician, psychologist, or psychiatrist of the person's choice, which
17 must be included in the file and considered by the court.

18 **Section 3. That § 29A-5-403 be AMENDED:**

19 **29A-5-403.** A guardian of a protected person shall file a report with the court
20 within sixty days following the first anniversary of the appointment and:

- 21 (1) At least annually thereafter;
- 22 (2) When the court orders additional reports to be filed;
- 23 (3) When the guardian resigns or is removed; and
- 24 (4) When the guardianship is terminated unless the court determines that there is then
25 no need therefor.

26 A guardian may elect to file a periodic report on a calendar-year basis. However,
27 in no event may such a report cover a period of more than one year. A calendar-year
28 report shall be filed with the court no later than April fifteenth of the succeeding year.

29 ~~A report shall briefly state:~~

- 30 ~~(1) The current mental, physical and social condition of the protected person;~~
- 31 ~~(2) The living arrangements during the reporting period;~~
- 32 ~~(3) The medical, educational, vocational and other professional services provided to~~
33 ~~the protected person and the guardian's opinion as to the adequacy of the~~
34 ~~protected person's care;~~

- 1 ~~(4) A summary of the guardian's visits with and activities on the protected person's~~
 2 ~~benefit;~~
- 3 ~~(5) If the protected person is institutionalized, whether the guardian agrees with the~~
 4 ~~current treatment or habilitation plan;~~
- 5 ~~(6) A recommendation as to the need for continued guardianship and any~~
 6 ~~recommended changes in the scope of the guardianship;~~
- 7 ~~(7) Any other information requested by the court or useful in the opinion of the~~
 8 ~~guardian;~~
- 9 ~~(8) The compensation requested and the reasonable and necessary expenses incurred~~
 10 ~~by the guardian; and~~
- 11 ~~(9) The date on which the guardian completed the training curricula required pursuant~~
 12 ~~to § 29A-5-119.~~

13 ~~A guardian shall mail a copy of the report to the individuals and entities specified~~
 14 ~~in § 29A-5-410 no later than fourteen days following its filing.~~

15 ~~Any interested person may request a hearing on the report. The court may order~~
 16 ~~the guardian to attend the hearing on the report on the court's own motion or on the~~
 17 ~~petition of any interested person. A report of the guardian may be incorporated into and~~
 18 ~~made a part of the accounting of the conservator.~~

19 **Section 4. That chapter 29A-5 be amended with a NEW SECTION:**

20 A report shall briefly state:

- 21 (1) The current mental, physical and social condition of the protected person;
- 22 (2) The living arrangements during the reporting period;
- 23 (3) The medical, educational, vocational, and other professional services provided to
 24 the protected person and the guardian's opinion as to the adequacy of the
 25 protected person's care;
- 26 (4) A summary of the guardian's visits with and activities on the protected person's
 27 benefit;
- 28 (5) A statement indicating whether or not the protected person has made any
 29 statements or indications to the guardian, or any other person who has informed
 30 the guardian, that the protected person does not want the guardianship to
 31 continue, or that the protected person wants a different guardian to be appointed;
- 32 (6) If the protected person is institutionalized, whether the guardian agrees with the
 33 current treatment or habilitation plan;

1 ~~(6)~~(7) A recommendation as to the need for continued guardianship and any
2 recommended changes in the scope of the guardianship;

3 ~~(7)~~(8) Any other information requested by the court or useful in the opinion of the
4 guardian;

5 ~~(8)~~(9) The compensation requested and the reasonable and necessary expenses incurred
6 by the guardian; and

7 ~~(9)~~(10) The date on which the guardian completed the training curricula required
8 pursuant to § 29A-5-119.

9 A guardian shall mail a copy of the report to the individuals and entities specified
10 in § 29A-5-410 no later than fourteen days following its filing.

11 Within sixty days of the filing of the annual report, any interested person may
12 request a hearing on the report. The court may order the guardian to attend the hearing
13 on the report on the court's own motion or on the petition of any interested person. A
14 report of the guardian may be incorporated into and made a part of the accounting of the
15 conservator if the same individual holds both appointments.

16 If the report indicates that the protected person wants to have the guardianship
17 ended, or wants to have another person to serve as the guardian, the court must
18 determine if a hearing is necessary, based on the totality of the circumstances, including
19 whether or not a hearing has previously been held on the same issue.

20 **Section 5. That § 29A-5-408 be AMENDED:**

21 **29A-5-408.** A conservator shall file an accounting with the court within sixty days
22 following the first anniversary of the appointment and:

- 23 (1) At least annually thereafter;
24 (2) When the court orders additional accounts to be filed;
25 (3) When the conservator resigns or is removed; and
26 (4) When the conservatorship is terminated.

27 A conservator may elect to file a periodic accounting on a calendar-year basis.
28 However, in no event may such an accounting cover a period of more than one year. A
29 calendar-year report shall be filed with the court no later than April fifteenth of the
30 succeeding year.

31 ~~An accounting shall include:~~

- 32 ~~(1) A listing of the receipts, disbursements, and distributions from the estate under~~
33 ~~the conservator's control during the period covered by the account;~~
34 ~~(2) A listing of the estate;~~

- 1 ~~(3) The services being provided to the protected person;~~
 2 ~~(4) The significant actions taken by the conservator during the reporting period;~~
 3 ~~(5) A recommendation as to the continued need for conservatorship and any~~
 4 ~~recommended changes in the scope of the conservatorship;~~
 5 ~~(6) Any other information requested by the court or useful in the opinion of the~~
 6 ~~conservator;~~
 7 ~~(7) The compensation requested and the reasonable and necessary expenses incurred~~
 8 ~~by the conservator;~~
 9 ~~(8) An annual inventory of any item of tangible personal property with a value of two~~
 10 ~~thousand five hundred dollars or more which has come into the conservator's~~
 11 ~~possession or knowledge for the minor or protected person; and~~
 12 ~~(9) The date on which the conservator completed the training curricula required~~
 13 ~~pursuant to § 29A-5-119.~~

14 ~~A conservator shall mail a copy of the accounting to the individuals and entities~~
 15 ~~specified in § 29A-5-410 no later than fourteen days following its filing. A conservator~~
 16 ~~shall notify all persons receiving the accounting that they must present written objections~~
 17 ~~within fourteen days after receipt or be barred from thereafter objecting.~~

18 ~~Upon filing an objection, any interested person may request a hearing on the~~
 19 ~~accounting. The court may order the conservator to attend the hearing on an account on~~
 20 ~~the court's own motion or on the petition of any interested person. An accounting by a~~
 21 ~~conservator may be incorporated into and made a part of the report of the guardian.~~

22 ~~Subject to written objection, appeal, or vacation within the time permitted, an~~
 23 ~~order allowing an account of a conservator adjudicates as to liabilities concerning all~~
 24 ~~matters disclosed in the account.~~

25 **Section 6. That chapter 29A-5 be amended with a NEW SECTION:**

26 An accounting shall include:

- 27 (1) A listing of the receipts, disbursements, and distributions from the estate under
 28 the conservator's control during the period covered by the account;
 29 (2) A listing of the estate;
 30 (3) The services being provided to the protected person;
 31 (4) The significant actions taken by the conservator during the reporting period;
 32 (5) A statement indicating whether or not the protected person has made any
 33 statements or indications to the conservator, or any other person who has informed
 34 the conservator, that the protected person does not want the conservatorship to

1 continue, or that the protected person wants a different conservator to be
 2 appointed.

3 ~~(6)~~ A recommendation as to the continued need for conservatorship and any
 4 recommended changes in the scope of the conservatorship;

5 ~~(6)(7)~~ Any other information requested by the court or useful in the opinion of the
 6 conservator;

7 ~~(7)(8)~~ The compensation requested and the reasonable and necessary expenses incurred
 8 by the conservator;

9 ~~(8)(9)~~ An annual inventory of any item of tangible personal property with a value of two
 10 thousand five hundred dollars or more which has come into the conservator's
 11 possession or knowledge for the minor or protected person; and

12 ~~(9)(10)~~ The date on which the conservator completed the training curricula required
 13 pursuant to § 29A-5-119.

14 A conservator shall mail a copy of the accounting to the individuals and entities
 15 specified in § 29A-5-410 no later than fourteen days following its filing. A conservator
 16 shall notify all persons receiving the accounting that they must present written objections
 17 within sixty days after receipt or be barred from thereafter objecting.

18 Upon filing an objection, any interested person may request a hearing on the
 19 accounting. The court may order the conservator to attend the hearing on an account on
 20 the court's own motion or on the petition of any interested person. An accounting by a
 21 conservator may be incorporated into and made a part of the report of the guardian if the
 22 same individual holds both appointments.

23 Subject to written objection, appeal, or vacation within the time permitted, an
 24 order allowing an account of a conservator adjudicates as to liabilities concerning all
 25 matters disclosed in the account.

26 If the report indicates that the protected person wants to have conservatorship
 27 ended, or wants to have another person serve as the conservator, the court must
 28 determine if a hearing is necessary, based on the totality of the circumstances, including
 29 whether or not a hearing has previously been held on the same issue.

30 **Section 7. That chapter 29A-5 be amended with a NEW SECTION:**

31 ~~An~~The court must grant an interested party ~~must have~~ access to some or all of a
 32 protected person's medical and financial records ~~of the protected person. The court must~~
 33 ~~grant access~~ if, on the motion of the interested party, the court finds access is in the best

- 1 interest of an interested party or the protected person and does not endanger the welfare
- 2 or financial interest of the protected person.

AMENDED