

Name \_\_\_\_\_

Address \_\_\_\_\_

Phone \_\_\_\_\_

Fax \_\_\_\_\_

E-mail \_\_\_\_\_

☐ I am the ☐ Guardian ☐ Conservator

☐ I am the attorney for ☐ Guardian ☐ Conservator

My Utah State Bar number is \_\_\_\_\_

In the \_\_\_\_\_ Judicial District Court \_\_\_\_\_ County, Utah  
Court Address: \_\_\_\_\_

In the Matter of:

\_\_\_\_\_  
(Ward).

☐ Guardian's Financial Accounting to  
Conservator [Section 75-5-312]

☐ Guardian's/Conservator's Financial  
Accounting to the Court  
[Section 75-5-312 and Section 75-5-419]

Case Number \_\_\_\_\_

Judge \_\_\_\_\_

1. I am the following to the above-named Ward:

- ☐ Guardian
- ☐ Conservator
- ☐ Guardian and Conservator

2. (Check all of the boxes which apply. Fill in the blanks if appropriate.)

- ☐ This is my first report.
- ☐ My previous report covered the period from \_\_\_\_\_ to \_\_\_\_\_.
- ☐ This is my final report.

3. This accounting covers the period from \_\_\_\_\_ to \_\_\_\_\_.

4. There is an estate plan to guide investment and distribution:

☐ No  
☐ Yes

☐ The plan is on file with the court.  
☐ The plan is being submitted along with this accounting.

5. Balance Summary (Beginning Balance must agree with Ending Balance of the Inventory or the previous accounting, whichever is later.)

Schedule	Category	Beginning Balance	Gains and Losses	Ending Balance
A	Real Estate			
B	Stocks and Bonds			
C	Money Owed to Ward			
D	Miscellaneous Property			
E	Debts and Encumbrances			
F	Cash and Cash Accounts		**	*
	Total			

\* This amount should equal the money in all of the Ward's bank accounts on the last day of the reporting period for this accounting.

\*\*The total Gains and Losses for Cash and Cash Accounts should equal the total for Receipts and Payments.

#### Summary of Receipts and Payments

1	Receipts Total	
2	Payments Total	
3	Total	**

\*\*The total Gains and Losses for Cash and Cash Accounts should equal the total for Receipts and Payments.

#### Receipts during the reporting period

Item	Description	Amount
1	Wages	
2	Interest	
3	Dividends	
4	Social Security	
5	Annuities	
6	Insurance	
7	Real Estate Sold	
8	Stocks/Bonds Sold	

Item	Description	Amount
9	Money owed to Ward that was received	
10	Miscellaneous Property Sold	
11	Other (Describe)	
12	Total	

Payments during the reporting period

Item	Category	(Amount)
1	Mortgage/Rent	
2	Utilities (gas, electricity, water, sewage, phone, internet, etc.)	
3	Home Maintenance (Include maintenance, cleaning, repairs, etc.)	
4	Home Improvement (Include additions, remodeling, etc.)	
5	Home Furnishings	
6	Health Care (physicians, dentists, psychiatrists, psychologists, etc.)	
7	Food	
8	Education	
9	Clothes	
10	Personal Effects	
11	Activities	
12	Transportation	
13	Taxes	
14	Charge for Conservator's Services	
15	Charge for Guardian's Services	
16	Charge for other Professional Services	
17	Court Fees	
18	Other (Describe)	
19	Total	

Schedule A – Real Estate\*

Item	Description	Value on First Day of this Reporting Period	Value on Last Day of this Reporting Period	Amount of Gain (Loss)
1				
2				
3				

\* Attach a copy of the most recent tax assessment for each piece of real property.

Schedule B – Stocks and Bonds\*

Item	Description	Value on First Day of this Reporting Period	Value on Last Day of this Reporting Period	Amount of Gain (Loss)
1				
2				
3				
4				
5				

\* Attach a copy of the most recent account statement if one has been issued.

Schedule C – Money owed to Ward

Item	Description	Value on First Day of this Reporting Period	Value on Last Day of this Reporting Period	Amount of Gain (Loss)
1				
2				
3				
4				
5				

Schedule D – Miscellaneous Property

Item	Description	Value on First Day of this Reporting Period	Value on Last Day of this Reporting Period	Amount of Gain (Loss)
1				
2				
3				
4				
5				

Schedule E – Debts and Encumbrances

Item	Description	Debts on First Day of this Reporting Period	Debts on Last Day of this Reporting Period	Amount of Gain (Loss)
1				
2				
3				
4				
5				

Schedule F – Cash Accounts (Such as checking or savings accounts)\*

Item	Description	Amount on First Day of this Reporting Period	Amount on Last Day of this Reporting Period	Amount of Gain (Loss)
1				
2				
3				
4				
5				

\* Attach a copy of the most recent bank statement for each account.

I declare under criminal penalty of Utah Code Section 46-5-101 that this document is true and correct.

\_\_\_\_\_  
Date

Sign here ► \_\_\_\_\_

\_\_\_\_\_  
(Type or Print Name Here)

Name \_\_\_\_\_

Address \_\_\_\_\_

Phone \_\_\_\_\_

Fax \_\_\_\_\_

E-mail \_\_\_\_\_

☐ I am the ☐ Guardian ☐ Conservator

☐ I am the attorney for ☐ Guardian ☐ Conservator

My Utah State Bar number is \_\_\_\_\_

In the \_\_\_\_\_ Judicial District Court \_\_\_\_\_ County, Utah  
Court Address: \_\_\_\_\_

In the Matter of:

\_\_\_\_\_  
(Ward).

Notice of Right to Object

Case Number \_\_\_\_\_

Judge \_\_\_\_\_

1. To \_\_\_\_\_ (name), a person interested in the Ward.

2. You may object to all or part of the documents listed below by filing your objection with the court. The court must receive your objection no later than 30 days from the date this notice was mailed.

3. The objection must specify the entries to which you object and the reasons for your objection. If you file an objection, the court will schedule a hearing of which you will be notified.

4. I have filed the documents marked below with the court and have attached copies of these documents to this Notice for you to review. If after reviewing them you don't agree with something, you may file a written objection with the court as explained above.

- ☐ Acknowledgement of Restricted Account
- ☐ Report on Status of the Ward
- ☐ Inventory (Utah Code Section 75-5-418)
- ☐ Guardian's Financial Accounting to the Conservator (Utah Code Section 75-5-312)
- ☐ Conservator's Financial Accounting to the Court (Utah Code Section 75-5-419)
- ☐ Notice of Right to Object
- ☐ Certificate of Posting and Mailing the Notice of Hearing
- ☐ Certificate of Mailing
- ☐ Motion to Terminate the Guardianship and/or Conservatorship
- ☐ Order to Terminate the Guardianship and/or Conservatorship
- ☐ Motion to Change Venue
- ☐ Order to Change Venue
- ☐ Motion to Change Reporting Period
- ☐ Order to Change Reporting Period
- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_

I declare under criminal penalty of Utah Code Section 46-5-101 that this document is true and correct.

\_\_\_\_\_  
Date

Sign here ► \_\_\_\_\_

\_\_\_\_\_  
(Type or Print Name Here)

Name \_\_\_\_\_

Address \_\_\_\_\_

Phone \_\_\_\_\_

Fax \_\_\_\_\_

E-mail \_\_\_\_\_

☐ I am the ☐ Guardian ☐ Conservator

☐ I am the attorney for ☐ Guardian ☐ Conservator

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Court Address: \_\_\_\_\_

In the Matter of:

\_\_\_\_\_  
(Ward).

Guardian and Conservator Certificate of  
Mailing

Case Number \_\_\_\_\_

Judge \_\_\_\_\_

I certify that on \_\_\_\_\_ (date), I mailed by first class mail the documents  
checked below to the people checked below at the addresses indicated below:

People

- ☐ the Ward
- ☐ the Ward's Guardian
- ☐ the Ward's Conservator
- ☐ the Ward's spouse, adult children, parents or siblings
- ☐ anyone who has requested notice under Utah Code Section 75-5-406.

Documents

- ☐ Acknowledgement of Restricted Account
- ☐ Report on Status of the Ward
- ☐ Inventory (Utah Code Section 75-5-418)
- ☐ Guardian's Financial Accounting to the Conservator (Utah Code Section 75-5-312)
- ☐ Conservator's Financial Accounting to the Court (Utah Code Section 75-5-419)
- ☐ Notice of Right to Object
- ☐ Certificate of Posting and Mailing the Notice of Hearing
- ☐ Certificate of Mailing



- ☐ Motion to Terminate the Guardianship and/or Conservatorship
- ☐ Order to Terminate the Guardianship and/or Conservatorship
- ☐ Motion to Change Venue
- ☐ Order to Change Venue
- ☐ Motion to Change Reporting Period
- ☐ Order to Change Reporting Period
- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_

Name	Address	City	State	Zip

I declare under criminal penalty of Utah Code Section 46-5-101 that this document is true and correct.

\_\_\_\_\_ Sign here ► \_\_\_\_\_

Date \_\_\_\_\_  
 \_\_\_\_\_  
*(Type or Print Name Here)*