

Helpful Hints For Conservators

- 1) Fill out reports as completely as possible. If a section is irrelevant, put a zero in the total and a diagonal line through the section. If a question is irrelevant, write N/A or “non-applicable” below it.**
- 2) Reports must show the protected person’s and conservator’s current information and the current reporting period.**
- 3) Beginning values in all categories should always match ending values from the previous report or plan.**
- 4) Each category must be totaled accurately.**
- 5) Professional services must be itemized by name and description of the charges.**
- 6) An account reconciliation must be completed for each checking or cash account whether or not copies of bank statements or check registers are included with the report. Copies of either bank statements or check registers should be included whenever they are available.**
- 7) Reports must be provided to all interested parties as identified in the original order of appointment and protected persons aged 12 and over unless notification waivers are signed and delivered to the court.**
- 8) Reports must be filed on or before due dates to avoid court intervention.**

Helpful Hints For Guardians

- 1) Fill out reports as completely as possible. As a minimum, the initial care plan and annual reports must show a thorough description of the ward’s well being, growth, health needs, financial resources available for care, changes in the ward’s life and the need for the guardianship to continue. If a question is irrelevant, write N/A or “non-applicable” below it.**
- 2) Reports must show the protected person’s and the guardian’s current information and the current reporting period.**
- 3) If no conservator is appointed, the guardian must report financial activity in the annual guardian’s report including the opening and closing balances for all accounts with all income, disbursements and liabilities.**
- 4) Reports must be provided to all interested parties as identified in the original order of appointment and protected persons aged 12 and over unless notification waivers are signed and delivered to the court.**
- 5) Reports must be filed on or before due dates to avoid court intervention.**