

**RULE CHANGE 2023(01)
COLORADO PROBATE CODE FORMS**

**Forms 785, 800, 805, 822, 824, 825, 826, 827, 828, 834, 846, 850, 862, 865, 866, 877, 878, 882, 883,
885, 910, 920, 921, 926, 940, 970, 971, 990, and 991**

<input type="checkbox"/> District Court <input type="checkbox"/> Denver Probate Court _____ County, Colorado Court Address: _____ <hr/> In the Interest of: _____ Ward/Protected Person _____	<div style="text-align: center;">▲ COURT USE ONLY ▲</div> <hr/> Case Number: _____ Division: _____ Courtroom: _____
FINAL ORDER ACCEPTING <input type="checkbox"/> GUARDIANSHIP <input type="checkbox"/> CONSERVATORSHIP IN COLORADO FROM SENDING STATE PURSUANT TO §15-14.5-302, C.R.S. UNIFORM ADULT GUARDIANSHIP AND PROTECTIVE PROCEEDINGS JURISDICTION ACT	

The court has received the Final Order Confirming Transfer from _____ (state) and:

The court appoints the following person as Guardian, Guardian and Conservator, Conservator N/A:

Name: _____
 Street Address: _____
 City: _____ State: _____ Zip Code: _____
 Mailing Address, if different: _____
City: _____ State: _____ Zip Code: _____
City: _____ State: _____ Zip Code: _____ Primary Phone : _____
 _____ Alternate Phone : _____
 Email Address: _____

The court appoints the following person as Conservator, N/A:

Name: _____
Street Address: _____
City: _____ State: _____ Zip Code: _____
Mailing Address, if different: _____
City: _____ State: _____ Zip Code: _____
Primary Phone : _____ Alternate Phone : _____
Email Address: _____
City: _____ State: _____ Zip Code: _____
Mailing Address, if different: _____
City: _____ State: _____ Zip Code: _____ Primary Phone : _____
 _____ Alternate Phone : _____
Email Address: _____

~~The court directs the issuance of Letters of Guardianship Letters of Conservatorship consistent with the final order of transfer that includes the order of appointment issued by _____ (state).~~

~~The court orders the following pursuant to § 15-14.5-302(6), C.R.S., no later than 90 days after issuance of this Order, the court shall determine whether the guardianship and/or conservatorship needs to be modified to conform with Colorado law. Pursuant to § 15-14.5-302(7), C.R.S., in granting the petition for transfer, the court recognizes the guardianship and/or conservatorship order from the other state, including the determination of the ward or protected person's incapacity and the appointment of guardian and/or conservator.~~

~~Therefore, the court orders the following:~~

~~1. The guardian and/or conservator must promptly notify the court if the guardian's and/or conservator's within 30 days of any street address, email address, or phone number changes and/or of any change of address for the ward and/or protected person.~~

~~The~~

~~2. The following shall apply based on the appointment of a guardian: The guardian must file the initial Guardian's Report - Adult (JDF 850) by _____ (date 60 days from appointment) and guardian must file an Annual Guardian's Report (JDF 850) on or before~~

~~2. _____~~

~~_____ (date) beginning in _____ (year) for the duration of the guardianship.~~

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~~The guardian may not establish or move the ward's custodial dwelling outside the State of Colorado without a court order.~~

~~a. The guardian may not establish or move the ward's custodial dwelling outside the State of Colorado without a court order.~~

~~b. The guardian must file the initial Guardian's Report - Adult (JDF 850) by _____ (date 60 days from appointment) and must file an Annual Guardian's Report (JDF 850) by each _____ (date) beginning in _____ (year) for the duration of the guardianship.~~

~~c. The guardian must manage the day-to-day finances for the support, care, education, health and welfare of the ward. The guardian is required to maintain supporting documentation for all receipts and all disbursements during the duration of this appointment. The court further orders the following:~~

~~_____~~

~~d. Medical powers of attorney, whether executed prior to or following the entry of this order, are terminated, except as follows:~~

~~_____~~

~~e. The guardian is authorized to access the ward's medical records and information. The guardian is deemed to be ward's personal representative for all purposes relating to ward's protected health information, as provided in HIPAA, Section 45 CFR 164.502(g)(2).~~

~~f. The guardian does not have the authority to obtain hospital or institutional care and treatment for mental illness, developmental disability, alcoholism or substance abuse against the will of the ward.~~

g. If the ward is an "at risk elder" or "at risk adult with an intellectual and developmental disability," and if the guardian has reasonable cause to believe that the ward has been abused or exploited or is at imminent risk of abuse or exploitation, the guardian is required to make a report to law enforcement within 24 hours after the observation or discovery pursuant to C.R.S. § 18-6.5-108(1)(b)(XII).

4. The following shall apply based on the appointment of a conservator: The guardian must manage the day-to-day finances for the support, care, education, health and welfare of the ward. The guardian is required to maintain supporting documentation for all receipts and all disbursements during the duration of this appointment. The court further orders the following:

The guardian is authorized to access the ward's medical records and information. The guardian is deemed to be ward's personal representative for all purposes relating to ward's protected health information, as provided in HIPAA, Section 45 CFR 164.502(g)(2).

3. ~~The guardian does not have the authority to obtain hospital or institutional care and treatment for mental illness, developmental disability, alcoholism or substance abuse against the will of the ward.~~

a. The conservator must file for approval with the court a Conservator's Financial Plan with Inventory (JDF 882) on or before _____ (date within 90 days from appointment). The value of the assets must be reported as of the date of this order.

b. The conservator must file a Conservator's Report (JDF 885) with the court each year on or before _____ (date). The time period covered in the report will begin on _____ (date) and end on _____ (date). The conservator is required to maintain all supporting documentation, including receipts and disbursements.

c. All financial powers of attorney, whether executed prior to or following the entry of this order, are terminated, except as follows:

The conservator shall:

serve without bond for the following reason(s):

serve with bond in the amount of \$ _____. The bond must be posted with the Court by _____ (date). If bond is posted by a surety, notice of any proceeding must be provided to the surety.

d. The conservator shall:

serve without bond for the following reason(s):

serve with bond in the amount of \$ _____. The bond must be posted with the Court by _____ (date). If bond is posted by a surety, notice of any proceeding must be provided to the surety.

3. ~~If the ward is an "at risk elder" or "at risk adult with an intellectual and developmental disability," and if the guardian has reasonable cause to believe that the ward has been abused or exploited or is at imminent risk of abuse or exploitation, the guardian is required to make a report to law enforcement within 24 hours after the observation or discovery pursuant to C.R.S. § 18-6.5-108(1)(b)(XII). The guardian and/or conservator must~~

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~~provide a copy of this Final Order to the ward or protected person and interested persons within 30 days of appointment and file a Notice of Appointment (JDF 812) with the Court. See §§ 15-14-311 or 15-14-409, C.R.S.~~

4. Within 30 days of appointment, the guardian and/or conservator must provide a copy of this Final Order to the ward or protected person and persons given notice of the Petition and must advise those persons using Notice of Appointment of Guardian and/or Conservator (JDF 812) that they have the right to request termination or modification of the conservatorship. See §§ 15-14-311 or 15-14-409, C.R.S.

~~The guardian must manage the day-to-day finances for the support, care, education, health and welfare of the ward. The guardian is required to maintain supporting documentation for all receipts and all disbursements during the duration of this appointment. The court further orders the following:~~

~~Medical powers of attorney, whether executed prior to or following the entry of this order, are terminated, except as follows:~~

4. The conservator must file the:

Inventory with Financial Plan with Inventory (JDF 882) within 90 days from the date of this order.;

AND

An Annual Conservator's Report (JDF 885) on or before _____ (date) beginning in _____ (year) for the duration of the conservatorship.

The reporting period for the report must be _____ (start date) through _____ (end date). Copies of all future filings with the court must be provided to the following identified as interested persons in this matter, by the one filing such documents.

5. Copies of all future court filings must be provided to the following interested persons: In addition, the guardian and/or conservator must provide a copy of the required reports, to the following interested persons within 10 days of filing with the court:

<u>Name of Interested Person</u>	<u>Relationship to Ward/Protected Person</u>
	Ward/Protected Person
	Spouse or partner in a civil union
	Adult Children
	Parents
	Guardian
	Conservator

--	--

6. The court directs the issuance of Letters of Guardianship as follows:

The powers and duties of the guardian are unrestricted.

OR

The powers and duties of the guardian are limited by the following restrictions:

7. The court directs the issuance of Letters of Conservatorship as follows:

The conservator may exercise all the powers granted in § 15-14-425, C.R.S., subject to the exclusions in § 15-14-411, C.R.S. The powers and duties of the conservator are otherwise unrestricted.

OR

The powers and duties of the conservator are limited by the following restrictions, if any:

The conservator must not, without prior court order, convey or encumber any real estate owned by the protected person.

To ensure notice of this prohibition, the conservator must record the letters evidencing appointment with the Clerk & Recorder of the County in which such real estate is located. The conservator must provide proof of the recording to the court.

8. The court further orders:

5. —

Name of Interested Person	Relationship to Ward/Protected Person
	Ward/Protected Person
	Spouse or partner in a civil union, if applicable
	Adult Children, if applicable
	Parents, if applicable
	Conservator, if applicable
	Guardian, if applicable

5. The guardian and/or conservator must provide a copy of this Final Order to the ward or protected person and interested persons within 30 days of appointment and file a Notice of Appointment (JDF 812) with the Court. See §§ 15-14-311 or 15-14-409, C.R.S.

6.5. The conservator shall:

serve without bond for the following reason(s):

~~Serve with bond in the amount of \$ _____, The bond must be posted with the Court by _____ (date). If bond is posted by a surety, notice of any proceeding must be provided to the surety.~~

~~**6. The court directs the issuance of Letters of Guardianship as follows:**~~

~~The powers and duties of the guardian are unrestricted.~~

~~OR~~

~~The powers and duties of the guardian are limited by the following restrictions:~~

~~_____~~
~~_____~~
~~_____~~

~~**5. The court directs the issuance of Letters of Conservatorship as follows:**~~

~~The conservator may exercise all the powers granted in § 15-14-425, C.R.S., subject to the exclusions in § 15-14-411, C.R.S. The powers and duties of the conservator are otherwise unrestricted.~~

~~OR~~

~~The powers and duties of the conservator are limited by the following restrictions, if any:~~

~~_____~~
~~_____~~
~~_____~~

~~The conservator must not, without prior court order, convey or encumber any real estate owned by the protected person.~~

~~To ensure notice of this prohibition, the conservator must record the letters evidencing appointment with the Clerk & Recorder of the County in which such real estate is located. The conservator must provide proof of the recording to the court.~~

~~**7.5. The court further orders:**~~

~~_____~~
~~_____~~
~~_____~~

Date: _____

Judge Magistrate

Notice to Interested Persons

You have the right to request termination or modification of the guardianship pursuant to §§ 15-14-318, C.R.S. and/or conservatorship pursuant to 15-14-431, C.R.S.

<input type="checkbox"/> District Court <input type="checkbox"/> Denver Probate Court _____ County, Colorado Court Address: _____ In the Interest of: Protected Person	▲ COURT USE ONLY ▲ Case Number: _____ Division: _____ Courtroom: _____
ACKNOWLEDGMENT OF RESPONSIBILITIES <input type="checkbox"/> CONSERVATOR AND/OR <input type="checkbox"/> GUARDIAN	

I, _____ (name), acknowledge that I was appointed as the conservator and/or guardian for _____ (ward or protected person) on _____ (date) and I understand that Letters of Guardianship/Conservatorship will not be issued until this form is signed and provided to the court. I agree to comply with statutory and court requirements and understand that I am responsible for preparing and filing reports and/or plans with the court and providing copies to all interested persons as identified in the Order of Appointment.

I have received the following information to review regarding my responsibilities.

- User's Manual for Guardians User's Manual for Conservators
- Viewed [Informational Modules/DVD/Video](#) Pamphlets
- Attendance at mandatory training session on _____ (date).
- Other: _____

Acknowledgment of Responsibilities:

1. I am responsible for promptly providing the court with any changes to my mailing address, email address, and telephone number by filing a Notice of Change Regarding Contact Information (JDF 725).
2. I am responsible for maintaining supporting documentation for all receipts into the accounts and all disbursements out of the accounts under my control during the duration of my appointment. Supporting documentation includes bank statements and check copies, credit card statements and receipts, sales receipts, and other such forms of proof that support my reports. I understand that the court or any interested persons may request copies at any time.
3. If funds must be placed in a restricted account, I understand that any withdrawals require a court order.
 - The Acknowledgment of Deposit of Funds to Restricted Account (JDF 867) must be returned to the court as documentation that the funds were deposited, within 45 days or by _____ (date).
 - All requests for withdrawal must be in writing by submitting a Motion to Withdraw Funds (JDF 868).
 - [The Restricted Account Report \(JDF 896\) is due on _____ \(date\) and every year thereafter on such day and month, unless I am notified by the court.](#)
4. I understand that the following reports and/or plans are due on _____ (date).
 - Initial Guardian's Report/Care Plan - Adult (JDF 850)
 - Conservator's Financial Plan with Inventory and Motion for Approval (JDF 882)
5. I understand that the following reports are due on _____ (date) and every year thereafter on such day and month, unless I am notified by the court:
 - Guardian's Report - Minor (JDF 834)
 - Guardian's Report - Adult (JDF 850) Conservator's Report (JDF 885)

6. I understand that as a court-appointed guardian and/or conservator, I am required by law to report any known or suspected abuse, neglect, or exploitation of any at-risk elder (a person 70 years of age or older) to law enforcement. I understand that criminal penalties may result from failure to comply with this law. Please refer to § 18-6.5-108, C.R.S. for additional information.

7. I understand that all reports must be filed on the most current version of the form and that the forms are available on the state court website: <http://www.courts.state.co.us>

By checking this box, I am acknowledging I am filling in the blanks and not changing anything else on the form.

By checking this box, I am acknowledging that I have made a change to the original content of this form.

My signature below indicates that I have read and understand my responsibilities as a newly appointed guardian and/or conservator.

VERIFICATION

I declare under penalty of perjury under the law of Colorado that the foregoing is true and correct.

Executed on the _____ day of
(date)

Executed on the _____ day of
(date)

_____, _____,
(month) (year)

_____, _____,
(month) (year)

at _____
(city or other location, and state OR country)

at _____
(city or other location, and state OR country)

(printed name)

(printed name)

(Signature of Guardian/Conservator/Successor)

(Signature of Co-Guardian/Co-Conservator/Successor, if any)

<input type="checkbox"/> District Court <input type="checkbox"/> Denver Probate Court _____ County, Colorado Court Address:	
In the Interest of:	
Respondent	
▲ COURT USE ONLY ▲	
Attorney or Party Without Attorney (Name and Address):	Case Number:
Phone Number: E-mail: FAX Number: Atty. Reg. #:	Division Courtroom
ACCEPTANCE OF OFFICE – GUARDIANSHIPS AND CONSERVATORSHIPS	

1. I, _____ (name), accept appointment to, and agree to perform the duties and discharge the trust of, the office of (check all that apply):
 - Guardian.
 - Emergency guardian.
 - Temporary guardian.
 - Conservator.
 - Special conservator.

2. I submit personally to the jurisdiction of this court in any proceeding relating to this matter.

3. A legible copy of my driver's license, passport, or other government-issued identification is filed/e-filed as a separate document.

4. I request that the court waive required background information because I am (if this paragraph applies, check all boxes below that apply, and skip questions 5 through 9)-:
 - a public administrator.
 - a trust company, bank, credit union, savings and loan, or other financial institution.
 - a state or county agency.
 - the respondent's parent, and I reside with the respondent.
 - a person or entity for whom good cause exists to waive such disclosures. State reasons of good cause:

~~The court may require a nominee to obtain additional background information that the court considers necessary to assist it in determining the fitness of the nominee for the appointment sought. Such information may include requiring a nominee to obtain fingerprint-based criminal history record checks through the Colorado Bureau of Investigation and the Federal Bureau of Investigation at the nominee's expense. (§ 15-14-110(5), C.R.S.)~~

5. I have have not been convicted of, pled no contest to, or received a deferred sentence for one or more felonies or misdemeanors. If so, describe all:

Name of State and Court Issuing Order

6. I have have not had a temporary or permanent civil restraining/protection order issued against me. If so, describe all:

Name of State and Court Issuing Order

7. A civil judgment has has not been entered against me. If so, describe all:

Name of State and Court Entering Judgment

5.8. I have have not been relieved from one or more court-appointed responsibilities. If so, describe all:

Name of State and Court Relieving Nominee

6.9. Copies of my name-based criminal history record check obtained through the Colorado Bureau of Investigation and my current credit report are filed/e-filed as separate documents. (See instructions below.)

7.10. I am am not a "professional" which is defined as: an individual or entity engaged in the business of providing services as guardian or conservator, who is not related to the respondent by blood, law, or marriage. A professional usually acts as guardian or conservator for two or more individuals.

8.11. ~~The nominee~~ acknowledges and understands that if I am appointed to serve as guardian and/or conservator and the nominee fails to file required reports or plans with the court or fails to respond to an order of the court to show cause why ~~the nominee~~ should not be held in contempt of court, Colorado law authorizes the court to access data and records of state agencies in order to obtain contact information, as defined in §§15-14-317(4)(c) and 15-14-420(6)(c), C.R.S.

Note: Social security numbers should not be attached to or written on this Acceptance of Office.

- By checking this box, I am acknowledging I am filling in the blanks and not changing anything else on the form.
- By checking this box, I am acknowledging that I have made a change to the original content of this form.

VERIFICATION

I declare under penalty of perjury under the law of Colorado that the foregoing is true and correct.

Executed on the _____ day of _____, _____,
(date) (month) (year)

at _____
(city or other location, and state OR country)

(printed name)

(signature)

Notes

- To obtain a name-based criminal history check from the Colorado Bureau of Investigation (CBI), contact CBI: 690 Kipling Street, Suite 3453000, Lakewood, CO 80215; (303) 239-4208; or at www.colorado.gov/cbi. For online search requests: go to www.cbirecordscheck.com. The cost may be less and response time may be faster than written request. Credit card payment is required.
- To obtain a current credit report, contact any of the following credit reporting agencies:
 - a) Equifax Credit Information Services, Inc.; P.O. Box 740241, Atlanta, GA 30374; 1-800-685-1111; or www.equifax.com ;
 - b) Experian; 1-888-397-3742; or www.experian.com ; or
 - c) TransUnion, Annual Credit Report Request Service; P.O. Box 105281, Atlanta, GA 30348; 1-877-322-8228; or www.transunion.com .
- § 15-14-110, C.R.S., requires that the costs for all criminal history checks and credit reports be paid by the proposed guardian/conservator (nominee).
- § 15-14-110(5)(a), C.R.S., nothing in this section prohibits the court from requiring the nominee to obtain additional background information as the court deems necessary to assist in determining

[the fitness of the nominee, including requiring the nominee to obtain fingerprint-based criminal history checks through the Colorado Bureau of Investigation and Federal Bureau of Investigation.](#)

- § 15-14-110(5)(b), C.R.S., requires the court to order the nominee to submit to a name-based ~~criminal history~~[judicial](#) record check, as defined in § 22-2-119.3(6)(d), when the results of a fingerprint-based criminal [history](#) record check reveal the nominee has a record of arrest without a disposition.

<input type="checkbox"/> District Court <input type="checkbox"/> Denver Probate Court _____ County, Colorado Court Address: In the Interest of: Minor	▲ COURT USE ONLY ▲
Attorney or Party Without Attorney (Name and Address): Phone Number: _____ E-mail: _____ FAX Number: _____ Atty. Reg. #: _____	Case Number: Division Courtroom
PETITION FOR CONFIRMATION OF APPOINTMENT OF GUARDIAN PURSUANT TO § 15-14-202(6), C.R.S.	

I, _____ (name of appointed guardian), hereby petition the court to confirm my appointment as guardian and state the following:

1. The Affidavit of Acceptance of Appointment by Written Instrument as Guardian for Minor Pursuant to § 15-14-202, C.R.S. (JDF 821) was filed with the court on _____ (date) and this petition is filed within 30 calendar days from said filing date.
2. The minor, if 12 years of age or older, has or has not consented to the appointment of the guardian and the verified Consent or Nomination of Minor (JDF 826) has been filed with the court.
3. The appointed guardian believes that the confirmation is in the best interest of the minor.
4. This petition and the Affidavit of Acceptance of Appointment (JDF 821) has been given to the following persons (all applicable must be given notice):
 - Appointing parent or guardian, if living.
 - All adults with whom the minor is currently residing.
 - All adults who had care and custody of the minor in the last 60 days.
 - The minor, if 12 years of age or older.
5. Regarding the Indian Child Welfare Act (ICWA):
 - I am aware of the child or child's relatives having American Indian/Native American or Alaska Native [ancestry/heritage](#).

Name of tribe(s) _____

NOTE: If you checked that you are aware of the child or child's relatives having any American Indian/Native American or Alaska Native [ancestry/heritage](#), you must complete and file with the court, JDF 1350 – Indian Child Welfare Act (ICWA) Assessment Form.

I am not aware of the child or child's relatives having any American Indian/Native American or Alaska Native [ancestry/heritage](#).

[NOTE: If you checked that you are not aware of the child or child's relatives having any American Indian/Native American or Alaska Native heritage, you must complete and file JDF 1351 – American Indian/Alaska Native Indian Child Welfare Act \(ICWA\) Declaration of Non-Indian Heritage.](#)

- By checking this box, I am acknowledging I am filling in the blanks and not changing anything else on the form.
- By checking this box, I am acknowledging that I have made a change to the original content of this form.

VERIFICATION

I declare under penalty of perjury under the law of Colorado that the foregoing is true and correct.

Executed on the _____ day of
(date)

Executed on the _____ day of
(date)

_____, _____,
(month) (year)

_____, _____,
(month) (year)

at _____
(city or other location, and state OR country)

at _____
(city or other location, and state OR country)

(printed name)

(printed name)

(Signature of Petitioner)

(Signature of Co-Petitioner, if any)

Attorney Signature, (if any)

Date

CERTIFICATE OF SERVICE

I certify that on _____ (date), a copy of this _____ (name of document) was served as follows on each of the following:

Name and Address	Relationship to Decedent, Ward, or Protected Person	Manner of Service*

*Insert one of the following: hand delivery, first-class mail, certified mail, e-service, or fax.

Signature

<input type="checkbox"/> District Court <input type="checkbox"/> Denver Probate Court _____ County, Colorado Court Address:	
In the Interest of: Minor	▲ COURT USE ONLY ▲
Attorney or Party Without Attorney (Name and Address): Phone Number: E-mail: FAX Number: Atty. Reg. #:	Case Number: Division Courtroom
PETITION FOR APPOINTMENT OF GUARDIAN FOR MINOR	

1. No court proceeding is pending in this state or elsewhere concerning the respondent.
Or
 The following proceeding(s) concern(s) the respondent. Identify name of court, case number, state, date, and type of proceeding if any.

Name of Court	Case Number	State	Date of Proceeding	Type of Proceeding

2. Regarding the Indian Child Welfare Act (ICWA):
 I am aware of the child or child's relatives having American Indian/Native American or Alaska Native [ancestry/heritage](#).
 Name of tribe(s) _____

NOTE: If you checked that you are aware of the child or child's relatives having any American Indian/Native American or Alaska Native [ancestry/heritage](#), you must complete and file with the court, JDF 1350 – Indian Child Welfare Act (ICWA) Assessment Form.

I am not aware of the child or child's relatives having any American Indian/Native American or Alaska Native [ancestry/heritage](#).

[NOTE: If you checked that you are not aware of the child or child's relatives having any American Indian/Native American or Alaska Native heritage, you must complete and file JDF 1351 – American Indian/Alaska Native Indian Child Welfare Act \(ICWA\) Declaration of Non-Indian Heritage.](#)

3. **The petitioner is:**
 a person interested in the welfare of the minor.
or
 the minor and is 12 years of age or older.

This is a petition for appointment of a(n):
 Guardian. (NOTE: The appointment will expire on the minor's 18th birthday, unless otherwise ordered by the court.)

Guardian with a request for findings establishing the Minor's eligibility for classification as a special immigrant juvenile under federal law pursuant to § 15-14-204(2.5)(b), C.R.S. (NOTE: The appointment will expire on the minor's 21st birthday, unless otherwise ordered by the court.)

Temporary Guardian (not to exceed 6 months). (§ 15-14-204(4), C.R.S.)

Emergency Guardian (not to exceed 60 days). (§ 15-14-204(5), C.R.S.)

4. Information about the petitioner:

Name: _____ List all names used (also known as, formerly known as, etc.): _____

Relationship to minor: _____

Street Address: _____

City: _____ State: _____ Zip Code: _____

Mailing Address, if different: _____

City: _____ State: _____ Zip Code: _____

Primary Phone: _____ Alternate Phone: _____

Email Address: _____

Does Petitioner need an interpreter? No Yes (Language: _____)

5. Information about the minor:

Name: _____ Current age: _____ Date of Birth: _____

Street Address: _____

City: _____ State: _____ Zip Code: _____

Mailing Address, if different: _____

City: _____ State: _____ Zip Code: _____

Primary Phone: _____ Alternate Phone: _____

Email Address: _____

Does the minor need an interpreter? No Yes (Language: _____)

6. Information about the parents:

Parent's Name: _____ Deceased Unknown (attach Birth Certificate)

Street Address: _____

City: _____ State: _____ Zip Code: _____

Mailing Address, if different: _____

City: _____ State: _____ Zip Code: _____

Primary Phone: _____ Alternate Phone: _____

Email Address: _____

Does this person need an interpreter? No Yes (Language: _____)

Parent's Name: _____ Deceased Unknown (attach Birth Certificate)

Street Address: _____

City: _____ State: _____ Zip Code: _____

Mailing Address, if different: _____

City: _____ State: _____ Zip Code: _____

Primary Phone: _____ Alternate Phone: _____

Email Address: _____

Does this person need an interpreter? No Yes (Language: _____)

7. The parent or guardian has nominated has not nominated a guardian by will or other writing. (Attach copy of document, if applicable.)

8. Venue for this proceeding is proper in this county because the minor:
 resides in this county.
 is present in this county at the time the proceeding is commenced.

9. The best interest of the minor will be served by the appointment of a guardian.

10. The minor is unmarried and:

the parent(s) consent(s) to the appointment of a guardian. (Attach Consent of Parent - JDF 825).

all parental rights have been terminated by

prior court order. (Attach a copy of the court order to this petition.)

death. (If available, attach a copy of the death certificate to this petition.)

parents are unwilling or unable to exercise their parental rights. (Briefly explain.)

guardianship has previously been granted to a third party who has died or become incapacitated and the guardian has not appointed a successor guardian by will or written instrument. (Describe and attach order or any relevant documents.)

11. Petitioner is 21 years of age or older, nominates himself or herself and requests to be appointed as guardian.

or

Petitioner nominates the following person, who is 21 years of age or older, to be appointed as guardian. (§15-14-206, C.R.S.)

Name: _____ List all names used (also known as, formerly known as, etc.): _____

Relationship to Minor: _____

Street Address: _____

City: _____ State: _____ Zip Code: _____

Mailing Address, if different: _____

City: _____ State: _____ Zip Code: _____

Primary phone: _____ Alternate phone: _____

Email Address: _____

Does this person need an interpreter? No Yes (Language: _____)

12. The minor, who is 12 years of age or older, has nominated a guardian. (Attach Consent or Nomination of Minor - JDF 826).

13. It is necessary to appoint a temporary guardian (may not exceed six months) for the minor until a hearing can be held on this petition because an immediate need exists, and the appointment of a temporary guardian is in the best interest of the minor. (§15-14-204(4), C.R.S.)

(Describe the immediate need.) _____

14. It is necessary to appoint an **emergency guardian** (may not exceed 60 days) for the minor, because of the likelihood of substantial harm to the minor's health or safety, an emergency ~~exists~~exists, and no other person appears to have authority to act in the circumstances. (§ 15-14-204(5) C.R.S.)

(Describe the nature of the emergency.) _____

15. The following person had the primary care and custody of the minor during the 60 days prior to the filing of this petition:

Name: _____ Relationship to Minor: _____

Street Address: _____

City: _____ State: _____ Zip Code: _____

Mailing Address, if different: _____

City: _____ State: _____ Zip Code: _____

Primary Phone: _____ Alternate Phone: _____

Email Address: _____

Dates of Care: _____

Does this person need an interpreter? No Yes (Language: _____)

16. The parents are both deceased. The following person is the adult relative nearest in kinship that can be found:

Name: _____ Relationship to Minor: _____

Street Address: _____

City: _____ State: _____ Zip Code: _____

Mailing Address, if different: _____

City: _____ State: _____ Zip Code: _____

Primary phone: _____ Alternate phone: _____

Email Address: _____

Does Petitioner need an interpreter? No Yes (Language: _____)

17. The following person is currently acting as guardian or conservator for the minor in Colorado or elsewhere:

Name: _____ Relationship to Minor: _____

Street Address: _____

City: _____ State: _____ Zip Code: _____

Mailing address, if different: _____

City: _____ State: _____ Zip Code: _____

Primary Phone: _____ Alternate Phone: _____

Email Address: _____

Does Petitioner need an interpreter? No Yes (Language: _____)

18. The guardian may receive compensation.

The hourly rates to be charged, any amounts to be charged pursuant to a published fee schedule, including the rates and basis for charging fees for any extraordinary services, and any other bases upon which a fee charged to the estate will be calculated, are as stated below or in an attachment to this petition. *

The basis of compensation has not yet been determined.

* There is a continuing obligation to disclose any material changes to the basis for charging fees. (§ 15-10-602, C.R.S.)

19. Counsel for the guardian may be compensated.

The hourly rates to be charged, any amounts to be charged pursuant to a published fee schedule, including the rates and basis for charging fees for any extraordinary services, and any other bases upon which a fee charged to the estate will be calculated, are as stated below or in an attachment to this petition. *

The basis of compensation has not yet been determined.

* There is a continuing obligation to disclose any material changes to the basis for charging fees. (§ 15-10-602, C.R.S.)

20. The minor's assets are:

Description of Assets (e.g. bank accounts, property)	Estimated Value
<input type="checkbox"/> None	
	\$
	\$
Total	\$

21. The minor's income is:

Description of Income (e.g. social security, insurance)	Estimated Amount of Income
<input type="checkbox"/> None	
	\$
	\$
Total	\$

22. The petitioner requests that an appointment of a guardian be made after notice and hearing.

In addition, petitioner requests the following:

By checking this box, I am acknowledging I am filling in the blanks and not changing anything else on the form.

By checking this box, I am acknowledging that I have made a change to the original content of this form.

VERIFICATION

I declare under penalty of perjury under the law of Colorado that the foregoing is true and correct.

Executed on the _____ day of
(date)

Executed on the _____ day of
(date)

_____, _____,
(month) (year)

_____, _____,
(month) (year)

at _____
(city or other location, and state OR country)

at _____
(city or other location, and state OR country)

(printed name)

(printed name)

(Signature of Petitioner)

(Signature of Co-Petitioner, if any)

Attorney Signature, (if any)

Date

<input type="checkbox"/> District Court <input type="checkbox"/> Denver Probate Court _____ County, Colorado Court Address: <hr/> In the Interest of: Minor	▲ COURT USE ONLY ▲
Attorney or Party Without Attorney (Name and Address): Phone Number: E-mail: FAX Number: Atty. Reg. #:	Case Number: Division Courtroom
CONSENT OF PARENT	

I, _____ (parent), of the above-named minor.

1. Regarding the Indian Child Welfare Act (ICWA):

I am aware of the child or child's relatives having American Indian/Native American or Alaska Native [ancestry/heritage](#).

Name of tribe(s) _____

NOTE: If you checked that you are aware of the child or child's relatives having any American Indian/Native American or Alaska Native [ancestry/heritage](#), you must complete and file with the court, JDF 1350 – Indian Child Welfare Act (ICWA) Assessment Form.

I am not aware of the child or child's relatives having any American Indian/Native American or Alaska Native [ancestry/heritage](#).

[NOTE: If you checked that you are not aware of the child or child's relatives having any American Indian/Native American or Alaska Native heritage, you must complete and file JDF 1351 – American Indian/Alaska Native Indian Child Welfare Act \(ICWA\) Declaration of Non-Indian Heritage.](#)

2. I consent to the appointment of _____ (name) as guardian.

3. I consent to a guardianship with the following restrictions:

By checking this box, I am acknowledging I am filling in the blanks and not changing anything else on the form.

By checking this box, I am acknowledging that I have made a change to the original content of this form.

VERIFICATION

I declare under penalty of perjury under the law of Colorado that the foregoing is true and correct.

Executed on the _____ day of _____, _____,
(date) (month) (year)

at _____
(city or other location, and state OR country)

(printed name)

(signature)

<input type="checkbox"/> District Court <input type="checkbox"/> Denver Probate Court _____ County, Colorado Court Address: _____ In the Interest of: Minor	▲ COURT USE ONLY ▲ <hr/> Case Number: _____ Division _____ Courtroom _____
ORDER APPOINTING GUARDIAN FOR MINOR	

Upon consideration of the Petition for Appointment of Guardian for the above minor and hearing on _____ (date),

The court has considered any expressed wishes of the minor concerning the selection of the guardian. The court has considered the powers and duties of the guardian, the scope of the guardianship, and the priority and qualifications of the nominee.

The court finds, determines and orders:

1. Venue is proper and required notices have been given or waived.
2. The minor was born on _____ (date).
3. An interested person seeks appointment of a guardian.
4. The minor's best interest will be served by the appointment of a guardian.
5. The minor's parents' consent to the appointment of a guardian.
 The minor's parents' parental rights have been terminated by prior court order.
 The minor's parents are deceased.
 The minor's parents are unwilling or unable to exercise their parental rights.
 Guardianship has previously been granted to a third party who has died or become incapacitated and the guardian has not appointed a successor guardian by will or written instrument.
6. The court finds it has no reason to know that the minor is an Indian Child as defined by the Indian Child Welfare Act under 25 U.S.C. § 1901 et seq.

OR

A separate Order regarding the court's findings pursuant to the Indian Child Welfare Act under 25 U.S.C. § 1901 et seq. was issued.

7. The court appoints the following person as guardian for the minor:

Name: _____
 Street address: _____
 City: _____ State: _____ Zip Code: _____
 Mailing Address, if different: _____
 City: _____ State: _____ Zip Code: _____

Primary Phone: _____ Alternate Phone: _____
Email Address: _____

8. The guardian must promptly notify the court if the guardian's homestreet address, email address, or phone number changes and of any change of address for the minor.
9. The guardian may not establish or move the minor's custodial dwelling outside the State of Colorado without a court order.
10. Within 30 days of appointment, the guardian must provide a copy of this Order Appointing Guardian for Minor to the minor if 12 years or older and persons given notice of the petition and must advise those persons using Notice of Appointment of Guardian and/or Conservator (JDF 812) that they have the right to request termination or modification of the guardianship.
11. The guardian must file the annual Guardian's Report - Minor (JDF 834) with the court each year by the minor's birthday or by _____ (date).
12. Copies of all future court filings must be provided to the following interested persons:

Name	Relationship to Minor
	The minor if 12 years or older at the time of mailing
	Parent or adult nearest in kinship
	Parent or adult nearest in kinship
	Guardian

13. The guardian is authorized to access the minor's medical records and information. The guardian is deemed to be the minor's personal representative for all purposes relating to the minor's protected health information, as provided in HIPAA, Section 45 CFR 164.502(g)(2).
14. Letters of Guardianship will be issued. The Letters will expire on the minor's 18th birthday, _____ (date), unless otherwise ordered by the court.

- The powers and duties of the guardian are unrestricted.
 The powers and duties of the guardian are limited by the following restrictions:

OR

The appointment is pursuant to § 15-14-204(2.5)(b), C.R.S. Letters of Guardianship will be issued. The Letters will expire on the minor's 21st birthday, _____ (date), unless otherwise ordered by the court.

- The powers and duties of the guardian are unrestricted.
 The powers and duties of the guardian are limited by the following restrictions:

A separate Order regarding the court's findings establishing the minor's eligibility for classification as a special immigrant juvenile was issued.

15. Per § 15-14-208(1), C.R.S. the guardian has the powers of a parent regarding the ward's support, care, education, health and welfare. The guardian shall maintain physical custody of the minor and shall determine the minor's place of residence and all visitation absent specific orders from the Court.

15-16. **The court further orders:**

Date: _____

 Judge Magistrate

<input type="checkbox"/> District Court <input type="checkbox"/> Denver Probate Court _____ County, Colorado Court Address: _____ In the Interests of: _____ Minor	▲ COURT USE ONLY ▲ Case Number: _____ Division _____ Courtroom _____
ORDER APPOINTING TEMPORARY GUARDIAN FOR MINOR PURSUANT TO § 15-14-204(4), C.R.S.	

Upon consideration of the Petition for Appointment of Temporary Guardian for the above minor and/or hearing on _____ (date),

The court finds, determines and orders:

1. Venue is proper and required notices have been given or waived.
2. The minor was born on _____ (date).
3. A qualified person seeks appointment.
4. An immediate need exists for the appointment of a temporary guardian and the appointment would be in the best interest of the minor.
5. The temporary guardianship cannot exceed six months from appointment.
6. The court finds it has no reason to know that the minor is an Indian Child as defined by the Indian Child Welfare Act under 25 U.S.C. § 1901 et seq.

OR

A separate Order regarding the court's findings pursuant to the Indian Child Welfare Act under 25 U.S.C. § 1901 et seq. was issued.

7. The court appoints the following person as temporary guardian for the minor:

Name: _____
 Street address: _____
 City: _____ State: ____ Zip Code: _____
 Mailing address, if different: _____
 City: _____ State: _____ Zip Code: _____
 Primary phone: _____ Alternate phone: _____
 Email address: _____

8. The guardian must promptly notify the court if the guardian's [homestreet](#) address, email address, or phone number changes and of any change of address for the minor.

9. The guardian may not establish or move the minor's custodial dwelling outside the state of Colorado without a court order.
10. Copies of all future court filings must be provided to the following interested persons:

Name	Relationship to Minor
	Minor if 12 years or older at time of mailing
	Parent or adult nearest in kinship
	Parent or adult nearest in kinship

11. The guardian must provide a copy of this Order Appointing Temporary Guardian for Minor to the minor (if 12 years of age or older) and interested persons within 5 days after the appointment pursuant to § 15-14-204(4), C.R.S.
12. The temporary guardian is authorized to access the minor's medical records and information. The temporary guardian is deemed to be the minor's personal representative for all purposes relating to the minor's protected health information, as provided in HIPAA, Section 45 CFR 164.502(g)(2).
13. Letters of temporary guardianship will be issued. This temporary guardianship expires on _____ (date not to exceed 6 months from appointment.)

- The powers and duties of the temporary guardian are unrestricted.
- The powers and duties of the temporary guardian are limited by the following restrictions:

14. The court further orders:

Date: _____

_____ Judge Magistrate

<input type="checkbox"/> District Court <input type="checkbox"/> Denver Probate Court _____ County, Colorado Court Address: _____ <hr/> In the Interest of: Minor	▲ COURT USE ONLY ▲
Attorney or Party Without Attorney (Name and Address): _____ Phone Number: _____ E-mail: _____ FAX Number: _____ Atty. Reg. #: _____	Case Number: _____ Division Courtroom
GUARDIAN'S REPORT – MINOR	

Current Reporting Period From _____ To _____
(MM/DD/YYYY) (MM/DD/YYYY)
(REPORTING DATES MUST BE FOR THE PAST YEAR AND MAY NOT REPORT INTO THE FUTURE.)

Instructions to guardian:

You have been ordered to complete a Guardian's Report every year on behalf of the minor. When answering the questions in this report, you are required to provide details. Answers such as "same as last year" or "no change since last report" are not acceptable answers. Your report may be rejected with those answers.

COLORADO LAW REQUIRES THAT ANY GUARDIAN WANTING TO REMOVE THE MINOR CHILD FROM THE STATE OF COLORADO MUST OBTAIN COURT PERMISSION. You must file the necessary forms to make this request and obtain court permission.

CONTACT INFORMATION

Minor's Information:

Check if Updated Information from last Report

Name: _____ **Age:** _____

Street Address: _____
 (Include Name of Living Center or Nursing Home)

City: _____ State: _____ Zip Code: _____

Mailing Address, if different: _____
 City: _____ State: _____ Zip Code: _____

Primary Phone : _____ Alternate Phone: _____

Guardian's Information:

Check if Updated Information from last Report

Name: _____ **Age:** _____

Occupation: _____ Your Relationship to Minor: _____

Street Address: _____

City: _____ State: _____ Zip Code: _____

Mailing Address, if different: _____

City: _____ State: _____ Zip Code: _____ E-Mail Address: _____

Primary Phone: _____ Alternate Phone: _____

Have you had any criminal charges filed against you or convictions entered since the last report? Yes No

If Yes, explain: _____

Co-Guardian's Information: (if applicable) **Check if Updated Information from last Report**

Name: _____ **Age:** _____

Occupation: _____ Your Relationship to Minor: _____

Street Address: _____

City: _____ State: _____ Zip Code: _____

Mailing Address, if different: _____

City: _____ State: _____ Zip Code: _____

E-Mail Address: _____

Primary Phone: _____ Alternate Phone: _____

Have you had any criminal charges filed against you or convictions entered since the last report? Yes No

If Yes, explain: _____

I. STATUS INFORMATION **Yes** **No**

A. Do you recommend that the guardianship continue?
If **No**, explain: _____

B. Do you recommend any changes to the guardianship?
If **Yes**, explain: _____

C. Do you wish to remain guardian?
If **No**, explain: _____

Note: If you wish to terminate this guardianship or modify by replacing the current guardian or adding a co-guardian, you must file a separate petition with the court.

D. The minor's care and living situation is: Very Good Good Adequate Poor

E. Do you believe the current plan for care is in the minor's best interest? Yes No
If **No**, describe your recommended changes:

F. Who currently provides the majority of the minor's supervision or care and treatment on a daily basis?

Name _____

Primary Phone: _____

Alternate Phone: _____

G. Has the minor's residence changed since the last report? Yes No

If **Yes**, identify the date of the move, address of residence, type of residence and reason for the change.

Date of Move	Address of Residence	Type of Residence	Reason for Change

II. PERSONAL CARE AND OTHER ISSUES

A. Date of the minor's last medical exam: _____ Dental exam: _____

B. Are the Minor's immunizations current? Yes No

If **No**, explain: _____

C. Is the minor covered under health or dental insurance? Yes No

If **Yes**, describe coverage. If **No**, explain efforts to obtain coverage.

D. Describe any counseling services provided to the minor. If none were provided, state "none".

E. Describe any other services provided to the minor. If none were provided, state "none".

F. Describe any medical services provided to the minor. If none were provided, state "none".

G. Identify any special needs of the minor during this reporting period. If none were identified, state "none".

H. Has the minor's physical and medical condition changed since the last report? Yes No If Yes, explain:

I. Identify any significant events involving the minor since the last report e.g. special awards or recognition. If none were identified, state "none".

J. Has the minor been involved in a juvenile delinquency case or any other type of court action? Yes No If Yes, in which County? _____

K. Does the minor have any behavioral issues? Yes No Describe the nature of the behavioral issues and any treatment the minor is receiving to help with the issues. _____

L. If the minor child is not of school age, identify the stages of development for the minor child. This would include but is not limited to, if the child developed his or her motor skills (crawling, walking, etc.), learned to talk, and learned colors, shapes and numbers at age appropriate times. Include if the child is on track developmentally for his or her age and if not on track, explain why not and the steps taken to help the child. Does the child's doctor have any concerns?

- M. Does the minor have any contact with the parents or other family members? Yes No
Briefly describe the visits: Name of person visiting, frequency and length of visits and date of the last visit.
If no visits, briefly describe why not.

III. EDUCATION AND EXTRACURRICULAR ACTIVITIES

- A. Is the minor attending school: Yes No

If **Yes**, complete the information below: If **No**, please be sure to answer question L on page 4, Part II.

Name of School: _____ Current Grade Level: _____

Address: _____

Phone Number: _____ Minor's grades are: Excellent Average Below Average

If **below average** explain why.

- B. If the minor is old enough, does he or she have a job? Yes No Describe.

- C. Describe the educational services provided to the minor.

- D. Identify a few of the minor's goals, accomplishments, and any extracurricular activities during this reporting period.

IV. FINANCIAL MATTERS

Complete this section only if there is no conservatorship and the guardian has custody of funds.

- A. Does the minor own any property? Yes No
- B. Do you have possession or control of the minor's assets, e.g. property (real estate and personal property items), financial accounts? Yes No
 If Yes, describe the type of property and approximate value of the property: _____

- C. Do you have control of the minor's Income? Yes No
- D. If Yes, describe: _____

_____ Do you or the minor receive any financial support from the biological parents or other family members? Yes No If there is a current child support order, provide the name of the court, case number, date of most recent order, and status of the payments.

Name of Court	Case Number	State	Date of Current Order	Amount	Payment Status e.g. on time, late

- E. If applicable, identify the representative payee for Social Security and other income benefits.
 Name: _____ Phone Number: _____

- F. Have any fees been paid to you in your role as guardian? Yes No
 If Yes, describe: _____

- G. Have any fees been paid to others for the care of the minor or his or her property? Yes No
 If Yes, describe: _____

SUMMARY OF FINANCIAL ACTIVITY DURING REPORTING PERIOD		
Beginning balance of bank accounts (savings, checking, etc.)	\$	
Plus monies received (social security, pension beneficiary, child support, interest, etc.) from any source on behalf of the person	+ \$	

Less total fees to care providers	-\$	
Less total monies paid to the Minor, e.g. personal needs	-\$	
Less total fees paid to guardian	-\$	
Less any other expenses, e.g. housing, insurance, maintenance	-\$	
Ending balance of bank accounts	\$	

You are required to maintain supporting documentation for all receipts and all disbursements under your control during the duration of this appointment. The court or any interested persons as identified in the Order Appointing Guardian may request copies at any time.

- By checking this box, I am acknowledging I am filling in the blanks and not changing anything else on the form.
- By checking this box, I am acknowledging that I have made a change to the original content of this form.

VERIFICATION

I declare under penalty of perjury under the law of Colorado that the foregoing is true and correct.

Executed on the _____ day of
(date)

Executed on the _____ day of
(date)

_____, _____,
(month) (year)

_____, _____,
(month) (year)

at _____
(city or other location, and state OR country)

at _____
(city or other location, and state OR country)

(printed name)

(printed name)

(Signature of Guardian)

(Signature of Co-Guardian, if any)

Attorney Signature, (if any)

Date

IMPORTANT THIS SECTION MUST BE COMPLETED CORRECTLY AND SIGNED OR THE REPORT MAY BE REJECTED.

The Guardian's Report must be served on the **WARD AND INTERESTED PERSONS** pursuant to Order Appointing Guardian (see § 15-14-207(2)(e), C.R.S.), including minors 12 years of age or older. In the space below under the Certificate of Service, list the names, addresses, and method of delivery for each party listed on the Order Appointing Guardian and provide each party with a copy of this report.

NOTE: If you wish to change the persons entitled to receive copies of reports or other documents filed, you must file a separate motion with the court.

CERTIFICATE OF SERVICE

I certify that on _____ (date), a copy of this _____ (name of document) was served as follows on each of the following:

Name and Address	Relationship to Decedent, Ward, or Protected Person	Manner of Service*

*Insert one of the following: hand delivery, first-class mail, certified mail, e-service, or fax.

Signature

	Spouse or partner in a civil union
	Parent
	Adult children

9. If an appointment is made without previous notice to the ward, the affected guardian or other interested persons, the temporary substitute guardian must, within 5 days after the appointment, provide copies to them.

10. The temporary substitute guardian is authorized to access the ward's medical records and information. The temporary substitute guardian is deemed to be the ward's personal representative for all purposes relating to the ward's protected health information, as provided in HIPAA, Section 45 CFR 164.502(g)(2).

11. **Letters of Guardianship will be issued.** This temporary substitute guardianship expires on _____ (date not to exceed 6 months from appointment). The temporary substitute guardian has the same powers as set forth in the previous Order Appointing Guardian, except as follows:

12. **The court further orders:**

Date: _____

Judge Magistrate

<input type="checkbox"/> District Court <input type="checkbox"/> Denver Probate Court _____ County, Colorado Court Address: _____ <hr/> In the Interest of: Ward	▲ COURT USE ONLY ▲
Attorney or Party Without Attorney (Name and Address): _____ Phone Number: _____ E-mail: _____ FAX Number: _____ Atty. Reg. #: _____	Case Number: _____ Division Courtroom
GUARDIAN'S REPORT – ADULT	

INITIAL REPORT/CARE PLAN ANNUAL REPORT

Current Reporting Period From _____ To _____
(MM/DD/YYYY) (MM/DD/YYYY)
(REPORTING DATES MUST BE FOR THE PAST YEAR AND MAY NOT REPORT INTO THE FUTURE.)

Instructions to Guardian:

Colorado law requires that every guardian of an adult complete a Guardian's Report every year. When answering the questions in this report, you are required to provide details. Answers such as "same as last report/year" and "no change since last report" are not acceptable answers. Your report may be rejected with those answers.

COLORADO LAW REQUIRES THAT ANY GUARDIAN WANTING TO REMOVE THE ADULT FROM THE STATE OF COLORADO MUST OBTAIN COURT PERMISSION. You must file the necessary forms to make this request and obtain Court permission.

CONTACT INFORMATION

Ward's Information: Check if Updated Information from last report (Annual Report ONLY)
 Check if Residency is Temporary (Care Plan ONLY)

Name: _____ **Age:** _____
Sex: _____
Street Address: _____
 (Include Name of Living Center or Nursing Home)
City: _____ **State:** _____ **Zip Code:** _____
Mailing Address, if different: _____
City: _____ **State:** _____ **Zip Code:** _____
Primary Phone: _____ **Alternate Phone:** _____

Guardian's Information: Check if Updated Information from last report

Name: _____ **Age:** _____ **Occupation:** _____
 _____ **Your Relationship to Ward:** _____
Street Address: _____

City: _____ State: _____ Zip Code: _____
 Mailing Address, if different: _____
 City: _____ State: _____ Zip Code: _____
 Primary Phone: _____ Alternate Phone: _____
 Email Address: _____

Have you had any criminal charges filed against you or convictions entered since the last report? Yes No
 If Yes, explain: _____

Co-Guardian's Information (if applicable): Check if updated information from last report

Name: _____ **Age:** _____
 Occupation: _____ Your Relationship to Ward: _____
 Street Address: _____
 City: _____ State: _____ Zip Code: _____
 Mailing Address, if different: _____
 City: _____ State: _____ Zip Code: _____
 Primary Phone: _____ Alternate Phone: _____
 Email Address: _____

Have you had any criminal charges filed against you or convictions entered since the last report? Yes No
 If Yes, explain: _____

I. PLACEMENT AND CARE SUPERVISION

A. Who currently supervises the ward's care and treatment on a daily basis?

Name: _____
 Primary Phone: _____ Alternate Phone: _____

B. If the ward has moved since the last reporting period, identify the date of the move, address of residence, type of residence, and reason for the change.

Date of Move	Name of Facility and Address	Type of Residence	Reason for Change

II. STATUS INFORMATION

Yes No

A. Do you recommend that the guardianship continue?
 If **No**, explain: _____

B. Do you recommend any changes to the guardianship?
 If **Yes**, explain: _____

C. Do you wish to remain guardian?

If **No**, explain: _____

Note: If you wish to terminate this guardianship or modify by replacing the current guardian or adding a co-guardian, you must file a separate petition with the Court.

III. CURRENT CONDITION OF THE WARD

Please describe in detail the current **mental** condition of the ward.:

Please describe in detail the current **physical** condition of the ward.:

Please describe in detail the current **social** condition of the ward.:

IV. PERSONAL CARE AND OTHER ISSUES

Yes No

A. Has the ward's physical and medical condition (illness/injuries) changed since the last report? If **Yes**, explain: _____

B. Has the ward been hospitalized since the last report?

If **Yes**, explain: _____

C. Have there been any medical, social or psychological evaluations of the ward performed?

Please explain: _____

D. Is there a need for further medical, social or psychological evaluations of the ward?

Please explain: _____

E. Describe the medical, educational, vocational and other services provided to the ward:-

Please describe in detail any **medical** services provided to the ward:- [If none were provided, state "none"](#).

Please list any **medications** provided to the ward. [If none were provided, state "none"](#):-

Please describe in detail any **educational** services provided to the ward. [If none were provided, state "none"](#):-

Please describe in detail any **vocational** services provided to ward. [If none were provided, state "none"](#):-

Please describe in detail any **other** services provided to ward. [If none were provided, state "none"](#):-

F. How often do you contact the ward's medical provider?

Daily Weekly Monthly Other: _____

How do you contact the ward's medical provider (phone, email, etc.)? _____

G. Do you believe the current plan for care, treatment and/or rehabilitation is in the ward's best interest?

Yes No If No, describe what changes would be appropriate.

H. The ward's care and living situation is Very Good Good Adequate Poor

I. Describe your plans for the ward's future care, including any recommended changes.

V. VISITATION OF WARD

Colorado law requires that a guardian maintain sufficient contact with the ward.

A. How often do you visit the ward? Daily Weekly Monthly Other: _____

B. How often do you contact the ward or the ward's care provider?
 Daily Weekly Monthly Other: _____

C. When was the last time you saw the ward in person? _____ (date)

D. Indicate how long your visits are and summarize your activities with and on behalf of the ward.

E. Does the ward participate in decision-making? Yes No Briefly describe.

VI. FINANCIAL MATTERS

Complete this section only if the guardian has custody of funds.

A. Are there sufficient financial resources to take care of the ward? Yes No
If **No**, what do you believe is the best way to handle this problem? _____

B. Do you have control of the ward's income? Yes No

If **Yes**, describe: _____

C. If applicable, identify the representative payee for Social Security and other income benefits.
 Name: _____ Phone Number: _____

D. Have any fees been paid to you in your role as guardian? **Yes** **No**
 If **Yes**, describe: _____

E. Have any fees been paid to others for the care of the ward or his/her property? **Yes** **No**
 If **Yes**, describe and identify name of person: _____

Please indicate whether you have possession or control of the following:

Bank Account(s): Name of financial institution(s) and last four numbers of account(s): _____

 Estimated Value: _____

Investment Account(s): Name of financial institution(s) and last four numbers of account(s): _____

 Estimated Value: _____

Real Estate: Address: _____
 Estimated Value: _____

Personal Property (i.e. jewelry, collectibles, vehicles...) Description: _____

 Estimated Value: _____

Liabilities/Debts: Creditor(s): _____
 Estimated Amount: _____

SUMMARY OF FINANCIAL ACTIVITY DURING REPORTING PERIOD		
Beginning balance of bank accounts (savings, checking, etc.)	\$	
Plus money received (Social Security, SSI, pension, disability, interest, etc.) from any source on behalf of the Ward	+\$	
Less total fees to care providers	-\$	
Less total monies paid to the Ward, e.g. personal needs	-\$	
Less total fees paid to guardian	-\$	
Less any other expenses, e.g. housing, insurance, maintenance	-\$	
Ending balance of bank accounts	\$	

You are required to maintain supporting documentation for all receipts and all disbursements under your control during the duration of this appointment. The court or any interested persons as identified in the Order Appointing Guardian may request copies at any time.

- By checking this box, I am acknowledging I am filling in the blanks and not changing anything else on the form.
- By checking this box, I am acknowledging that I have made a change to the original content of this form.

VERIFICATION

I declare under penalty of perjury under the law of Colorado that the foregoing is true and correct.

Executed on the _____ day of
(date)

Executed on the _____ day of
(date)

_____, _____,
(month) (year)

_____, _____,
(month) (year)

at _____
(city or other location, and state OR country)

at _____
(city or other location, and state OR country)

(printed name)

(printed name)

(Signature of Guardian)

(Signature of Co-Guardian, if any)

Attorney Signature, (if any)

Date

**IMPORTANT
THIS SECTION MUST BE COMPLETED CORRECTLY AND SIGNED
OR THE REPORT MAY BE REJECTED.**

Colorado Law **REQUIRES** that the Guardian's Report be served on the **WARD AND INTERESTED PERSONS** pursuant to Order Appointing Guardian and § 15-14-309(4), C.R.S. In the space below under the Certificate of Service, list the names, addresses, and method of delivery for each party listed on the Order Appointing Guardian and provide each party with a copy of this report.

NOTE: If you wish to change the persons entitled to receive copies of reports or other documents filed, you must file a separate motion with the court.

CERTIFICATE OF SERVICE

I certify that on _____ (date), a copy of this _____ (name of document) was served as follows on each of the following:

Name and Address	Relationship to Decedent, Ward, or Protected Person	Manner of Service*
------------------	--	--------------------

*Insert one of the following: hand delivery, first-class mail, certified mail, e-service, or fax.

Signature

<input type="checkbox"/> District Court <input type="checkbox"/> Denver Probate Court _____ County, Colorado Court Address: _____ <hr/> In the Interest of: Minor	▲ COURT USE ONLY ▲ <hr/> Case Number: _____ Division _____ Courtroom _____
ORDER APPOINTING CONSERVATOR FOR MINOR	

Upon consideration of the Petition for Appointment of Conservator for the above minor and hearing on _____ (date).

The Court finds that:

1. Venue is proper and required notices have been given or waived.
2. An interested person seeks the appointment of a conservator.
3. The person is a minor born on _____ (date).
4. The minor's best interest will be served by appointment of a conservator.
5. The appointment of a conservator is necessary because the minor:
 - Owns money or property that requires management or protection that cannot otherwise be provided.
 - Has or may have business affairs that may be put at risk or prevented because of the minor's age.
 - Needs money for support and education and that protection is necessary or desirable to obtain or provide money.
 - For reasons other than age the minor is unable to manage property and business affairs because he or she is unable to effectively receive and evaluate information or both or to make or communicate decisions, even with the use of appropriate and reasonably available technological assistance. The evidence is clear and convincing in this regard. Additionally, it has been shown that the minor has property that will be wasted or dissipated unless proper management is provided or that the minor, or persons entitled to the minor's support, require money for support, care, education, health, and welfare, and protection is necessary or desirable to obtain or provide money.
 - A conservator is required because the minor is missing, detained, or unable to return to the United States.

The court has considered any expressed wishes of the minor concerning the selection of the conservator. The court has considered the powers and duties of the conservator, the scope of the conservatorship, and the priority and qualifications of the nominee.

The court appoints the following person as conservator of the minor:

Name: _____

Street Address: _____

City: _____ State: _____ Zip Code: _____

Mailing Address, if different: _____

City: _____ State: _____ Zip Code: _____

Primary Phone: _____ Alternate Phone: _____

Email Address: _____

The court directs the issuance of Letters of Conservatorship as follows:

- The letters will expire on _____ (date) the minor's 21st birthday, unless otherwise ordered by the court.
- The powers and duties of the conservator are unrestricted. The conservator may exercise all the powers granted in §15-14-425, C.R.S.
- The conservator must open an account in a federally insured financial institution for the sole benefit of the minor or protected person. The account must be opened on behalf of the minor or protected person. The account must be opened using the sample title, "_____ (Name of Conservator),
for _____ (Name of Minor/Protected Person)". The conservator must deposit \$ _____ and funds received subsequently into the account. The conservator may make internal transfers of funds in order to take advantage of changes in interest rates except for internal transfers, the financial institution must permit no withdrawals from the account, except by separate certified order of this court. An Acknowledgment of Deposit of Funds to Restricted Account (JDF 867) must be returned to the court within 45 days. No attorney fees may be paid in this case until the acknowledgment form is signed and returned to the court.

- The powers and duties of the conservator are limited by the following restrictions:

The court orders the following:

1. The conservator must promptly notify the court ~~within 30 days~~ if his or her home street address, email address, or phone number changes and any change of address for the Minor.
2. Within 30 days of appointment, the conservator must provide a copy of this order, if 12 years or older, and persons given notice of the petition and must advise those persons using Notice of Appointment of Guardian and/or Conservator (JDF 812) that they have the right to request termination or modification of the conservatorship.
3. The conservator must:
 - file for approval with the court a Conservator's Inventory with Financial Plan (JDF 882) on or before _____ (date within 90 days from appointment). The value of the assets must be reported as of the date of this order.
 - file a Conservator's Report (JDF 885) with the court each year on or before _____ (date). The time period covered in the report must begin on _____ (date) and end on _____ (date). The conservator is required to maintain all supporting documentation; including receipts and disbursements.

file a Restricted Account Report (JDF 896) along with a copy of the most recent bank statement for the restricted account each year on the Minor's/Protected Person's birthday _____ (date) or on _____ (date).

4. The conservator will:

serve without bond for the following reason(s): _____

serve with bond in the amount of \$ _____. The bond must be posted with the Court by _____ (date). If bond is posted by a surety, notice of any proceeding must be provided to the surety.

5. Copies of all future Court filings must be provided to the following:

Name of Interested Person	Relationship to Minor
	The Minor if 12 years or older at the time of mailing
	Parent or adult nearest in kinship
	Parent or adult nearest in kinship
	Conservator

6. The court further orders:

Date: _____

 Judge Magistrate

Copies of all future court filings will be provided to the following interested persons:

Name	Relationship to minor/protected person
	Minor/protected person when 12 years or older
	Parent or adult nearest in kinship
	Other:

Dated: _____

 Judge Magistrate

The court further orders:

Copies of all future court filings will be provided to the following interested persons:

Name	Relationship to minor/protected person
	Minor/protected person when 12 years or older
	Parent or adult nearest in kinship
	Other:

Dated: _____

 Judge Magistrate

<input type="checkbox"/> District Court <input type="checkbox"/> Denver Probate Court _____ County, Colorado Court Address: <hr/> In the Interest of: Protected Person	▲ COURT USE ONLY ▲ <hr/> Case Number: Division: Courtroom:
ORDER APPOINTING SPECIAL CONSERVATOR <input type="checkbox"/> ADULT <input type="checkbox"/> MINOR	

Upon consideration of the Petition for Appointment of Conservator for the above person and hearing on _____ (date),

The court finds that:

1. Venue is proper and required notices have been given or waived.
2. An interested person seeks the appointment of a special conservator.
3. The protected person's best interest will be served by the appointment of a special conservator.

The court finds by clear and convincing evidence that:

For the following reasons, it is necessary to appoint a special conservator to preserve and apply the protected person's property as may be required for the support of the protected person or individuals who are in fact dependent upon the protected person, until a hearing can be held on the Petition for Appointment of Conservator:

It is necessary to appoint a special conservator to assist in the accomplishment of the following protective arrangement or other authorized single transaction. (§ 15-14-412(3), C.R.S.)

The court has appointed a professional without priority to serve pursuant to § 15-14-413(1), C.R.S. or a public administrator pursuant to § 15-12-622, C.R.S., without notice to the respondent, respondent's lawyer, or any other person entitled to notice. Accordingly, the court will simultaneously appoint a court visitor to investigate the appointment of the special conservator and file a report within 14 days after the appointment in accordance with § 15-14-412(3)(b), C.R.S. and § 15-14-113.5, C.R.S.

The court appoints the following person as special conservator:

Name: _____

Street Address: _____

City: _____ State: _____ Zip Code: _____

Mailing Address, if different: _____

City: _____ State: _____ Zip Code: _____

Primary Phone: _____ Alternate Phone: _____

Email Address: _____

The court directs the issuance of Letters of Conservatorship as follows:

The letters will expire on _____ (date), unless otherwise ordered by the court.

The special conservator is granted only the following authority:

The court orders the following:

1. The special conservator must promptly notify the court ~~within 30 days~~ if his or her ~~home~~street address, email address, or phone number changes and/or of any change of address for the protected person.
2. Within 30 days of appointment, the special conservator must provide a copy of this Order Appointing Special Conservator to the Protected Person, if 12 years of age or older, and persons given notice of the petition and must advise those persons using Notice of Appointment of Guardian and/or Conservator (JDF 812) that they have the right to request termination or modification of the special conservatorship.
3. This appointment is for single transactions and protective arrangements. The special conservator must report to the court by _____ (date). The report must include the following information:

4. The special conservator will:
 serve without bond for the following reason(s). _____

 serve with bond in the amount of \$ _____. The bond must be posted with the court by _____ (date). If bond is posted by a surety, notice of any proceeding must be provided to the surety.

5. Copies of all future court filings must be provided to the following:

Name of Interested Person	Relationship to Adult/Minor
	Adult/Minor
	Spouse or partner in a civil union
	Adult Children
	Parents
	Special Conservator
	Agent under power of attorney

6. The court further orders:

Date: _____

 Judge Magistrate

<input type="checkbox"/> District Court <input type="checkbox"/> Denver Probate Court _____ County, Colorado Court Address: <hr/> In the Interest of: <hr/> Protected Person	▲ COURT USE ONLY ▲ <hr/> Case Number: Division Courtroom
ORDER APPOINTING CONSERVATOR FOR ADULT	

Upon consideration of the Petition for Appointment of Conservator for the above person and hearing on _____
 _____ (date),

The court has considered any expressed wishes of the respondent concerning the selection of the conservator. The court has considered the powers and duties of the conservator, the scope of the conservatorship, and the priority and qualifications of the nominee.

The court finds that:

1. Venue is proper and required notices have been given or waived.
2. An interested person seeks the appointment of a conservator.
3. The protected person’s best interest will be served by appointment of a conservator.

The court finds by clear and convincing evidence that a basis exists for a conservatorship because:

The ~~protected person~~ respondent is unable to manage property and business affairs because of an inability to effectively receive or evaluate information or both or to make or communicate decisions, even with the use of appropriate and reasonably available technological assistance.

or

The ~~protected person~~ respondent is missing, detained, or unable to return to the United States;

The court further finds by a preponderance of evidence that:

The ~~protected person~~ respondent has property that will be wasted or dissipated unless proper management is provided.

and/or

The ~~protected person~~ respondent, or persons entitled to the protected person’s support, require money for support, care, education, health, and welfare; and protection is necessary or desirable to obtain or provide money.

~~The court has considered any expressed wishes of the protected person concerning the selection of the conservator. The court has considered the powers and duties of the conservator, the scope of the conservatorship, and the priority and qualifications of the nominee.~~

The court appoints the following person as conservator of the protected person:

Name: _____

Street address: _____

City: _____ State: _____ Zip Code: _____

Mailing address, if different: _____

City: _____ State: _____ Zip Code: _____

Primary Phone: _____ Alternate Phone: _____

Email address: _____

The court directs the issuance of Letters of Conservatorship as follows:

The conservator may exercise all the powers granted in. § 15-14-425, C.R.S., subject to the exclusions in § 15-14-411, C.R.S. The powers and duties of the conservator are otherwise unrestricted.

The powers and duties of the conservator are limited by the following restrictions, if any:

The conservator must not, without prior court order, convey or encumber any real estate owned by the protected person.

To ~~insure~~ensure notice of this prohibition, the conservator must record the letters evidencing appointment with the Clerk & Recorder of the County in which such real estate is located. The conservator must provide proof of the recording to the court.

The court orders the following:

1. The conservator must ~~promptly~~ promptly notify the court ~~within 30 days~~ if his or her ~~home~~street address, email address, or phone number changes and/or of any change of address for the protected person.
2. Within 30 days of appointment, the conservator must provide a copy of this Order Appointing Conservator for Adult to the protected person and persons given notice of the Petition and must advise those persons using Notice of Appointment of Guardian and/or Conservator (JDF 812) that they have the right to request termination or modification of the conservatorship.
3. The conservator must file for approval with the court a Conservator’s Financial Plan with Inventory (JDF 882) on or before _____ (date within 90 days from appointment). The value of the assets must be reported as of the date of this order.
4. The conservator must file a Conservator’s Report (JDF 885) with the court each year on or before _____ (date). The time period covered in the report will begin on _____ (date) and end on _____ (date). The conservator is required to maintain all supporting documentation, including receipts and disbursements.
5. All financial powers of attorney, whether executed prior to or following the entry of this order, are terminated, except as follows:

6. The conservator will:

serve without bond for the following reason(s): _____

serve with bond in the amount of \$ _____. The bond must be posted with the court by _____ (date). If bond is posted by a surety, notice of any proceeding must be provided to the surety.

7. Copies of all future court filings must be provided to the following:

Name of Interested Person	Relationship to the Protected Person
	The protected person
	Spouse or partner in a civil union
	Adult Children
	Parents
	Conservator

8. If the protected person is an “at-risk elder” or “at-risk adult with an intellectual and developmental disability” and if conservator has reasonable cause to believe that the protected person has been abused or exploited or is at imminent risk of abuse or exploitation, conservator is required to make a report to law enforcement within 24 hours after the observation or discovery pursuant to C.R.S. § 18-6.5-108(1)(b)(XII).

9. The court further orders:

Date: _____

 Judge Magistrate

<input type="checkbox"/> District Court <input type="checkbox"/> Denver Probate Court _____ County, Colorado Court Address:		▲ COURT USE ONLY ▲
In the Interest of: Protected Person		
Attorney or Party Without Attorney (Name and Address):		Case Number:
Phone Number:	E-mail:	Division Courtroom
FAX Number:	Atty. Reg. #:	
CONSERVATOR'S FINANCIAL PLAN WITH INVENTORY AND MOTION FOR APPROVAL		

INITIAL REPORT
INVENTORY VALUES AS OF DATE OF APPOINTMENT

AMENDED REPORT
INVENTORY VALUES AS OF DATE _____ (MM/DD/YYYY)

DATE OF APPOINTMENT _____ (MM/DD/YYYY)

FILING DUE DATE _____ (MM/DD/YYYY)

I, _____ (conservator), move this court to approve this Initial Amended Conservator's Financial Plan with Inventory.

As grounds therefore, the conservator states the following:

1. The information contained in the Financial Plan with Inventory is true and complete. The proposed plan is necessary to protect and manage the income and assets of the protected ~~p~~erson.
2. The Financial Plan is based on the actual needs and best interest of the protected person.

I understand that I am required to maintain supporting documentation for all receipts and disbursements including detailed billing statements from any professional. The court or any interested person as identified in the Order Appointing Conservator may request copies at any time.

I understand that I must provide copies of this Financial Plan with Inventory to the protected person and any others as identified in the Order Appointing Conservator, within 10 days of filing with the court and will indicate having done so by completing the certificate of service at the end of this form. (§ 15-14-404(4), C.R.S.)

Unless the court receives a timely objection to this motion, this matter will be considered unopposed and reviewed by the court.

Notice to interested persons. Interested persons have the responsibility to protect their own rights and interests within the time and in the manner provided by the Probate Code, including the appropriateness of disbursements, the compensation of fiduciaries, attorneys, and others, and the distribution of estate assets. Interested persons may file an objection with the court. The court may not review or adjudicate these or other matters unless specifically requested to do so by an interested person.

PART A: CONTACT INFORMATION

Protected Person's Information:

Check if updated information from petition

Name: _____ **Age :** _____

(Include Name of Living Center or Nursing Home, if applicable)

Street Address: _____

City: _____ State: _____ Zip Code: _____

Mailing Address, if different: _____

City: _____ State: _____ Zip Code: _____

Primary Phone: _____ Alternate Phone: _____

Conservator's Information:

Check if updated information from petition

Name: _____ **Age:** _____

Have you had any criminal charges filed against you or convictions entered since the last report? Yes No

If Yes, explain: _____

Occupation: _____ Your relationship to protected person: _____

Street Address: _____

City: _____ State: _____ Zip Code: _____

Mailing Address, if different: _____

City: _____ State: _____ Zip Code: _____

Primary Phone _____ Alternate Phone: _____

Email address: _____

Co-Conservator's Information: (if applicable)

Check if updated information from petition

Name: _____ **Age:** _____

Have you had any criminal charges filed against you or convictions entered since the last Petition? Yes No

If Yes, explain: _____

Occupation: _____ Your relationship to protected person: _____

Street Address: _____

City: _____ State: _____ Zip Code: _____

Mailing Address, if different: _____

City: _____ State: _____ Zip Code: _____

Primary Phone _____ Alternate Phone: _____

Email address: _____

PART B: CONSERVATORSHIP ISSUES

1. Are the assets in the estate identified to date sufficient to provide for the present and future care of the Protected Person? Yes No If **No**, describe why and what steps should be taken. If you would like the Court to take action, you *must* file a motion with the Court.

2. Should there be a change in scope of the Conservatorship? Yes No If Yes, describe why and what steps should be taken. If you would like the Court to take action, you *must* file a motion with the Court.

3. Bond has been set in the amount of \$ _____. Surety has been posted.

~~Bond has been waived by the Court.~~

The setting of bond was deferred pending filing of this Conservator's Financial Plan with Inventory and Motion for Approval.

The Conservator ~~requests~~ now requests the hat to bond be set in the amount of \$ _____.

OR

The Conservator requests the bond be waived for the following reasons:

~~Bond has been waived by the Court.~~

INSTRUCTIONS ON HOW TO COMPLETE THIS FORM

The Financial Plan and Inventory must be filed with the Court pursuant to §§15-14-418 and 15-14-419, C.R.S.

Steps 1 and 2 are a projection of the Protected Person's annual income and expenses. Enter both the anticipated monthly and annual amounts in the respective columns.

Step 3 is an inventory of the Protected Person's assets. Provide a detailed description of the asset as well as the current fair market value.

Step 4 summarizes all costs and expenses incurred by the estate related to this proceeding.

Step 5 summarizes all debts of the estate. Provide a detailed description as well as the remaining amount due.

Step 6 and 7 are a summary. Transfer the respective income and expense totals from Steps 1 and 2 as well as the asset and liability totals in steps 3 through 5 to the appropriate lines in Step 7 to calculate the net income and net worth.

PART C: FINANCIAL PLAN

List all expected sources of receipts/income and disbursements/expenses in the charts below. If a specific category is not applicable, indicate "0" in the projected monthly and annual amounts columns. You will use these amounts when you file the initial Conservator's Report.

Step 1: Projected Receipts/Income

Indicate the amount of cash receipts/income received on both a monthly and annual basis. If an income amount (such as wages) is to be received on a monthly basis, multiply the amount by 12 to determine the projected annual amount. If an income amount (such as dividends) is to be received on an annual basis, divide the amount by 12 to determine the projected monthly amount.

Description of Receipt/Income Category	Projected Monthly Amount	Projected Annual Amount
Asset Not Previously Reported		
Business Income		

Court Order Repayment		
Disability/Unemployment/Worker's Compensation		
Distribution – Annuity		
Distribution – Pensions/Retirement Plan		
Distribution - Trust		
Farm/Ranch Income		
Gifts from Others		
Inheritance		
Insurance Settlement/Benefit		
Interest/Dividends		
Loan Repayment		
Oil/Gas/Mineral Royalties		
Other Public Assistance		
Other Receipts/Income		
Proceeds from Sale of Assets		
Rental Income		
Reverse Mortgage Payment		
Social Security		
Tax Refunds		
VA Benefits		
Wages		
Total Receipts/Income Enter the total projected monthly and annual amounts in Step 6.		

Step 2: Projected Disbursements/Expenses

Indicate the cash disbursement/expense amount on both a monthly and annual basis. If an expense (such as utilities) is to be paid on a monthly basis, multiply the amount by 12 to determine the projected annual amount. If an expense (such as property taxes) is to be paid on an annual basis, divide the amount by 12 to determine the projected monthly amount.

Description of Disbursement/Expense Category	Projected Monthly Amount	Projected Annual Amount
Assisted Living/Care Facility		
Bank/Investment Account Fees		
Business Expenses (Not Farm or Ranch)		
Caregiver/In-Home Provider		
Charitable Contributions		

Clothing		
Collectibles		
Debt Repayment (excluding CC)		
Debt Repayment (Credit Card)		
Distributions-Protected Person		
Education/Tuition/Student Loan		
Entertainment/Movies		
Equipment		
Farm/Ranch Expense		
Fees–Accountant/CPA		
Fees-Conservator–Non Prof		
Fees–Conservator–Professional		
Fees–Court Visitor		
Fees-Guardian–Non Prof		
Fees-Guardian–Professional		
Fees-Guardian Ad Litem (GAL)		
Fees-Investment Acct Management		
Fees-Legal for Conservator		
Fees-Legal for Guardian		
Fees–Legal for GAL		
Fees–Legal for Protected Person		
Fees–Other Professional		
Funeral		
Gifts		
Groceries/Hygiene/Household Supplies		
HOA Fees		
Hobbies		
Home Furnishings		
Insurance – Home/Renter		
Insurance – Life		
Insurance – Long Term Care		
Insurance – Other		
Jewelry		
Livestock		
Loan Interest		
Loans		
Medical-Doctor/Prof/Hospital		
Medical- Furnishings/Supplies		
Medical-Insurance		

Medical-Medicab/Transportation		
Medical-Medications		
Medical-Other		
Mortgage		
Motor Vehicle - Insurance		
Motor Vehicle – Loan Payments		
Motor Vehicle – Registration/Other		
Motor Vehicle – Repairs/Maint/Fuel		
Moving Expenses		
Other Disbursement/Expense		
Other Transportation		
Pet Care		
Property Repairs/Maintenance		
Rent		
Restaurants/Dining Out		
School Supplies		
Services - Cleaning		
Services - Personal Care		
Subscriptions/Dues		
Taxes – FICA and Medicare		
Taxes – Income		
Taxes – Property and Assessments		
Travel/Vacations		
Utilities (Including Phone/Cell)		
Total Disbursements/Expenses Enter the total projected monthly and annual amounts in Step 6.	\$	\$

INVENTORY

Step 3: Current Assets

Report the fair market value of each category of asset in the chart below as of date of appointment. By indicating “None”, you are stating affirmatively that the Protected Person does not have assets in that category.

Note: If additional space is needed, separate sheets may be used. If additional items are discovered after the initial inventory has been completed, a supplemental inventory listing those additional item(s) must be completed.

Cash on Hand, Bank, Checking, Savings, Certificate of Deposits, and Health Accounts (Name of Bank or Financial Institution)	Payable on Death	Type of Account	Account # (last 4-digits only)	Balance
<input type="checkbox"/> None				

				\$
Total				\$

Stocks, Bonds, Mutual Funds, Securities, Annuities and Investment Accounts (Name of Joint Owner or Transfer on Death Beneficiary)	Number of Shares or Identify Account Number (last 4-digits only)	Current Value
<input type="checkbox"/> None		
		\$
Total		\$

Life Insurance (Name of Company/Beneficiary)	Type of Policy	Face Amount of Policy	Cash Value
<input type="checkbox"/> None			
			\$
Total			\$

Pension, Profit Sharing and Retirement Funds (Name of Beneficiary)	Type of Plan (401(k), IRA, 457, PERA, Military, etc.)	Account # (last 4-digits only, if applicable)	Current Account Value (Note: Distributions should be listed in Step 1 above)
<input type="checkbox"/> None			
			\$
Total			\$

Motor Vehicles and Recreation Vehicles (Including Motorcycles, ATV's, Boats, etc.) (Names of Joint Owners)	Year	Make and Model	Estimated Value (Value = what you could sell it for in its current condition)
<input type="checkbox"/> None			
			\$

Total			\$

Real Estate (Indicate address) (Name any Joint Owners) <input type="checkbox"/> None	Type of Property (Home, Rental, Land, etc.)	Estimated Value (Value = what you could sell it for in its current condition)
		\$
Total		\$

General Household and Other Personal Property <input type="checkbox"/> None	Estimated Value (Value = what you could sell it for in its current condition)
General Household and Other Personal Property (Total value except for items listed below.)	\$
Separately list and value items of significant value below, for example: Jewelry, Antiques, Collectibles, Artwork, etc.	
Total	\$

Miscellaneous Assets (List each one separately and be specific.) <input type="checkbox"/> None	Estimated Value (Value = what you could sell it for in its current condition)
	\$
Total	\$
Total Assets Enter this amount in Step 7.	\$

Step 4: Accrued Liabilities to Professionals

The conservator requests that the accrued expenses of this proceeding as of date of appointment as detailed below be approved by the court as identified in Step 2.

Type of Professional and Name of Individual	Amount Billed
Account Management - Professional	\$
Accountant/CPA	

Conservator-Non Professional	
Conservator-Professional	
Court Visitor	
Guardian-Non Professional	
Guardian - Professional	
Guardian Ad Litem (GAL)	
Legal Fees - Conservator	
Legal Fees - Guardian	
Legal Fees - GAL	
Legal Fees - Protected Person	
Other Professional Fees	
Total Accrued Expenses Enter totals below in Step 5 - Inventory of Liabilities/Debts.	\$

Step 5: Other Current Liabilities/Debts

Report the value of each liability/debt in the chart below as of date of appointment as identified in Step 2.

<input type="checkbox"/> Description of Liability/Debt	Name of Creditor	Account Number <small>(last 4-digits only)</small>	Balance
<input type="checkbox"/> None			
Accrued expenses associated with this proceeding (Total Step 4 above)			\$
Mortgage (principal due only)			
Motor Vehicle Loan			
2 nd Mortgage/Home Improvement			
Student Loan/Tuition			
Credit Card			
Federal Taxes			
State / Local Taxes			
Other Loan/Liability/Debt (Please list)			
HELOC			
Reverse Mortgage			
Total Liabilities/Debt Enter this amount in Step 7.	\$		

Summary

Step 6: Summary of Financial Plan (Receipts/Income Minus Disbursements/Expenses)

Summarize the Financial Plan below after completing the detailed accounting information in Step 1 and Step 2.

Projected Monthly Amount Projected Annual Amount

(A) Receipts/Income (Total from Step 1) \$ _____ \$ _____
 (B) Disbursements/Expenses (Total from Step 2) \$ _____ \$ _____

Net Income: (A) minus (B) \$ _____ \$ _____

Step 7: Summary of Inventory

Summarize the Inventory below after completing the detailed accounting information in Step 3 and Step 5.

(A) Total Assets (Total from Step 3) \$ _____
 (B) Total Liabilities/Debt (Total from Step 5) \$ _____

Net Worth: (A) minus (B) \$ _____

- By checking this box, I am acknowledging I am filling in the blanks and not changing anything else on the form.
- By checking this box, I am acknowledging that I have made a change to the original content of this form.

IMPORTANT

This document must be signed and dated by all conservators and served on the protected person and all interested parties, as indicated by the attached certificate of service.

A conservator is required to file an amended "Financial Plan" whenever there is a change in circumstances that requires a substantial deviation from the existing plan. In addition, if the conservator finds other property not included in the original "Inventory", or if the value of the listed property is inaccurate or misleading, the conservator must prepare and file an amended "Inventory" with the court. Copies of these amendments must be provided to all interested parties. § 15-14-418(5) C.R.S. § 15-14-419(2) C.R.S.

VERIFICATION

I declare under penalty of perjury under the law of Colorado that the foregoing is true and correct.

Executed on the _____ day of _____
 (date)
 _____,
 (month) (year)
 at _____
 (city or other location, and state OR country)

 (printed name)

Executed on the _____ day of _____
 (date)
 _____,
 (month) (year)
 at _____
 (city or other location, and state OR country)

 (printed name)

 (Signature of Conservator/Successor) (Signature of Co-Conservator/Successor, if any)

Attorney Signature, (if any)

Date

**THIS SECTION MUST BE COMPLETED CORRECTLY AND SIGNED
OR THE DOCUMENT MAY BE REJECTED.**

Colorado Law REQUIRES that the Conservator's Financial Plan with Inventory and Motion for Approval be served on the PROTECTED PERSON AND INTERESTED PERSONS pursuant to the Order Appointing Conservator, including minors 12 years of age or older (§ 15-14-404(4), C.R.S.). In the space below under the Certificate of Service, list the names, addresses, and method of delivery for each party listed on the Order Appointing Conservator and provide each party with a copy of this document.

CERTIFICATE OF SERVICE

I certify that on _____ (date), a copy of this _____ (name of document) was served as follows on each of the following:

Name and Address	Relationship to Decedent, Ward, or Protected Person	Manner of Service*

*Insert one of the following: hand delivery, first-class mail, certified mail, e-service, or fax.

Signature

<input type="checkbox"/> District Court <input type="checkbox"/> Denver Probate Court _____ County, Colorado Court Address: <hr/> In the Interest of: <hr/> Protected Person	 <div style="text-align: center;">▲ COURT USE ONLY ▲</div> <hr/> Case Number: <hr/> Division: Courtroom:
ORDER REGARDING CONSERVATOR'S FINANCIAL PLAN	

This matter comes before the court for approval of the Conservator's Financial Plan. The court having reviewed the Conservator's Financial Plan with Inventory and any responses or objections received from interested persons enters the following order:

The Financial Plan is **APPROVED**. The conservator is directed to file an amended Conservator's Financial Plan with Inventory whenever there is a change in the circumstances that requires a substantial deviation from this approved plan. **Approval does not relieve a conservator from fiduciary standards.**

The Financial Plan is **APPROVED** with the following **conditions**:

The Financial Plan is **NOT APPROVED** for the following reasons:

The conservator must file an amended Conservator's Financial Plan with Inventory by _____ (date).

The Conservator is directed to contact the court by _____ (date) to set this matter for hearing.

The setting of bond was deferred when the conservator was appointed.

- [The Conservator has requested the bond be set in the amount of \\$ _____.](#)
- [The court grants the request.](#)
- [The court denies the request.](#)

Pursuant to § 15-14-415, C.R.S., bond is now set in the amount of \$ _____. The bond must be posted with the court by _____ (date). If bond is posted by a surety, notice of any subsequent proceedings must be provided to the surety.

OR

The Conservator has requested the bond be waived.

The court grants the request. The Conservator will serve without bond for the following reason(s):

The court denies the request to waive bond. Bond amount stated above.

Date: _____

 Judge Magistrate

Name: _____ Age: _____

Occupation: _____ Your Relationship to Protected Person: _____

Street Address: _____

City: _____ State: _____ Zip Code: _____

Mailing Address, if different: _____

City: _____ State: _____ Zip Code: _____

Primary Phone: _____ Alternate Phone: _____

Email Address: _____

Have you had any criminal charges filed against you or convictions entered since the last report? Yes No

If Yes, explain: _____

***** Notice to Interested Persons:** Interested persons have the responsibility to protect their own rights and interests within the time and in the manner provided by the Probate Code, including the appropriateness of disbursements, the compensation of fiduciaries, attorneys, and others, and the distribution of estate assets. Interested persons may file an objection with the court. The court will not review or adjudicate these or other matters unless specifically requested to do so by an interested person.

PART B: CONSERVATORSHIP ISSUES

1. Is there a continued need for the conservatorship? Yes No If **No**, describe why and what steps should be taken. If you would like the court to take action, you *must* file a motion with the court.

2. Are the remaining assets in the estate sufficient to provide for the present and future care of the protected person? Yes No If **No**, describe why and what steps should be taken. If you would like the court to take action, you *must* file a motion with the court.

3. Should there be a change in scope of the conservatorship? Yes No If **Yes**, describe why and what steps should be taken. If you would like the court to take action, you *must* file a motion with the court.

4. **Attach a copy of the bond to this report, unless the bond was waived or not required by the court.** What is the amount of the bond? \$ _____. Is the amount of the bond sufficient to cover all unrestricted assets? Yes No If **No**, describe why and what steps should be taken. If you are requesting a change to the bond, you *must* file a motion with the court.

INSTRUCTIONS ON HOW TO COMPLETE THIS FORM

The Conservator's Report must be filed annually pursuant to §15-14-420, C.R.S. Part C of this report concerns the information necessary to satisfy the court that the conservator has maintained a complete accounting of all financial transactions and managed the protected person's estate responsibly.

Step 1 is a financial transaction detail and should be completed for each bank or investment account. A spreadsheet or report from personal accounting software may also be submitted in lieu of completing the transaction detail.

Steps 2 and 3 summarize the income and expense for the reporting period and compare those amounts to the previous period or the Financial Plan. Explain the cause for any changes between the current period amounts and amounts from the prior period or the Financial Plan.

Step 4 reports additional detail for fees paid to professionals including the hourly rate, number of hour worked, and description of services provided.

Steps 5 and 6 summarize assets and liabilities as of the reporting date and compare those amounts to the previous period or the Inventory. In addition to explaining the cause for any changes between the current period amounts and amounts from the prior period or the Inventory, provide specific detail regarding any asset purchases or sales.

Step 7 is a summary. Transfer the respective income and expense totals from Steps 2 and 3 as well as the asset and liability totals in steps 5 and 6 to the appropriate lines in Step 7 to calculate the net income and net worth.

Part C: FINANCIAL INFORMATION

Step 1: Detail Listing of Receipts/Income and Disbursements/Expenses

Complete this Detail for all bank accounts. Make additional copies of this form as necessary. Alternatively, Check Register form JDF 871, a spreadsheet, or a report from personal accounting software may be attached. Please list all transactions, including Income (deposits) and Expenses (withdrawals), for the entire reporting period. Each Receipt/Income item should be listed in the Amount Received column and each Disbursement/Expense item should be listed in the Amount Disbursed column. **** Note:** This report should resemble a check register for each bank account.

Name of Bank: _____ **Account Number** (last 4-digits only): _____

Date	Check or I.D. No.	Description of item Received or Disbursed, include Name of Payee (if Disbursement)	Amount Received	Amount Disbursed
Page _____ of _____			\$	\$
May continue entries on Check Register Form JDF 871				

Check here if additional detailed spreadsheets are attached to this report.

Individual Bank Account Summary

Beginning Cash Balance \$ _____ (Balance from prior year Report or Inventory)
Add: Total Amount of Income + \$ _____ (Total Income received from detail above)
Add: Total Amount Received as Transfer + \$ _____ (Total transferred from other bank accounts)
Less: Total Amount Disbursed - \$ _____ (Total disbursements from detail above)
Less: Total Amount Transferred out - \$ _____ (Total transfers moved to other accounts)

Ending Cash Balance = \$ _____ (Transfer this account balance to Step 5.)
 (This will be the beginning balance on next year's report)

Step 2: Receipts and Income

Column A: Is this the first annual Conservator's Report filed? Yes No

If **Yes**, use the amounts from the Inventory with Financial Plan (JDF 882) to complete Column A that is marked with an asterisk (*) below. If **No**, use the amounts from the prior Conservator's Report filed to complete Column A that is marked with an asterisk (*) below.

Column B: Transfer all individual income category totals from completed Detail Listing in Step 1 or attached spread sheet.

Column C: Calculate and record the difference between Column A and Column B.

Description of Receipt/Income Category	Column A *Total Amount of Receipts / Income from <input type="checkbox"/> Prior Reporting Period or <input type="checkbox"/> Financial Plan	Column B Total Amount of Receipts / Income for Current Reporting Period	Column C Change in Amount of Receipt/Income <i>Indicate +/-</i>
Asset Not Previously Reported			
Business Income			
Court Order Repayment			
Disability/Unemployment/Worker's Comp			
Distribution - Annuity			
Distribution – Pensions/Retirement Plan			
Distribution – Trust			
Farm/Ranch Income			
Gifts from Others			
Inheritance			
Insurance Settlement/Benefit			
Interest/Dividends			
Loan Repayment			
Oil/Gas/Mineral Royalties			
Other Public Assistance			
Other Receipts/Income			
Proceeds from Sale of Assets			
Rental Income			

Reverse Mortgage Payment			
Social Security			
Tax Refunds			
VA Benefits			
Wages			
TOTALS (Move to Step 7)			

Have Total Receipts/Income in Column B changed from the Prior Reporting Period or Financial Plan totals in Column A ? Yes No

If **Yes**, explain the changes below. Please include a description of any changes or unanticipated transactions. If income and expenses are anticipated to differ going forward, it may be necessary to file an Amended Inventory with Financial Plan and Motion for Approval (JDF 882) or a separate petition for approval with the court.

Step 3: Disbursements/Expenses

Column A: Use the amounts from the Inventory with Financial Plan (JDF 882) or from the prior Conservator’s Report filed to complete Column A that is marked with an asterisk (*) below.

Column B: Transfer all individual expense category “totals” from completed Detail Listing in Step 1 or attached spread sheet.

Column C: Calculate and record the difference between Column A and Column B.

Description of Disbursement / Expense Category	Column A *Total Amount of Disbursement / Expense from <input type="checkbox"/> Prior Reporting Period or <input type="checkbox"/> Financial Plan	Column B Total Amount of Disbursement / Expense for Current Reporting Period	Column C Change in amount of Disbursement/ Expense Indicate +/-
List Total Disbursements/Expenses from Detail Listing (From Step 1 or Separate Spreadsheet)			
Assisted Living/Care Facility			
Bank/Investment Account Fees			
Business Expenses (Not Farm or Ranch)			
Caregiver/In-Home Provider			
Charitable Contributions			
Clothing			
Collectibles			
Debt Repayment (excluding CC)			
Debt Repayment (Credit Card)			
Distributions - Protected Person			
Education/Tuition/Student Loan			
Entertainment/Movies			
Equipment			
Farm/Ranch Expense			
Fees – Accountant/CPA			

Fees – Conservator – Non-Prof			
Fees – Conservator-Prof			
Fees – Court Visitor			
Fees – Guardian – Non-Prof			
Fees – Guardian - Prof			
Fees – Guardian Ad Litem (GAL)			
Fees-Investment Acct Management			
Fees – Legal for Conservator			
Fees – Legal for Guardian			
Fees – Legal for GAL			
Fees – Legal for Protected Person			
Fees–Other Professional			
Funeral			
Gifts			
Groceries/Hygiene/Household Supplies			
HOA Fees			
Hobbies			
Home Furnishings			
Insurance – Home/Renter			
Insurance – Life			
Insurance – Long Term Care			
Insurance – Other			
Jewelry			
Livestock			
Loan Interest			
Loans			
Medical-Doctor/Prof/Hospital			
Medical Furnishings/Supplies			
Medical-Insurance			
Medical-Medicab/Transportation			
Medical-Medications			
Medical-Other			
Mortgage			
Motor Vehicle – Insurance			
Motor Vehicle – Loan Payments			
Motor Vehicle – Registration/Other			
Motor Vehicle – Repairs/Maint/Fuel			
Moving Expenses			
Other Disbursement/Expense			
Other Transportation			
Pet Care			
Property Repairs/Maintenance			
Rent			
Restaurants/Dining Out			
School Supplies			
Services – Cleaning			
Services – Personal Care			

Subscriptions/Dues			
Taxes – FICA and Medicare			
Taxes – Income			
Taxes – Property and Assessments			
Travel/Vacations			
Utilities (Including Phone/Cell)			
TOTALS (Move these totals to Step 7)			

Step 4: Conservator, Guardian, and Professional Fees Detail

List all conservators, guardians, and professionals paid. Include the hourly rate, number of hours worked, fees and costs, as well a description of the services provided and the benefit to the estate.

Name of Conservator, Guardian, and Professional	Hourly Rate (Range)	No. of Hours Worked	Total Hourly Fees	Other Costs Charged	Brief Description of Services Provided and Benefit to the Estate
Account Management – Professional					
Accountant/CPA					
Conservator–Non-Professional					
Conservator - Professional					
Court Visitor					
Guardian – Non-Professional					
Guardian - Professional					
Guardian Ad Litem (GAL)					
Legal Fees-Conservator					
Legal Fees-Guardian					
Legal Fees-GAL					
Legal Fees- Protected Person					
Other Professional Fees					
TOTAL (Fees and Costs) (Move these totals to Step 3)					

Have Total Disbursements/Expenses in Step 3, Column B Increased or Decreased from the Prior Reporting Period or Financial Plan in Step 3, Column A?

Explain the changes below. Please include a description of any changes or unanticipated transactions. A separate petition for approval may need to be filed with the court for significant changes outside the amounts allowed in the Inventory and Financial Plan.

Step 5: Assets

Column A: List the last 4 digits of all bank, investment or other financial accounts.

Column B: List name of the bank or financial institution in which accounts are being held, or describe specific asset.

Column C: Use amounts from the original Inventory with Financial Plan (JDF 882) **or** from the prior Conservator’s Report filed, to complete Column C marked with an asterisk (*) below.

Column D: List all cash and investment account balances. These should coincide and be transferred from the Ending Cash Balances on the Detail Listing in Step 1.

Column E: Calculate and record the difference between Column C and Column D.

Vehicles, real estate, and all other assets should be valued at what the asset could be sold for in its current condition (i.e. Fair Market Value).

Description of Asset (Identify all accounts)	Column A Account Number (last 4 digits)	Column B Name of Financial Institution or Description of Asset	Column C * Fair Market Value <input type="checkbox"/> as of Last Day of Prior Reporting Period or <input type="checkbox"/> Inventory	Column D Fair Market Value (as of Last Day of Current Reporting Period)	Column E Change in Value of Asset <i>Indicate +/-</i>
Checking Accounts Balance from Step 1					
Savings Accounts Balance from Step 1					
Certificate of Deposit					
Money Market					
Pre-Paid Debit Card					
Cash On Hand					
Stocks					
Bonds					
Mutual Fund					
Other Financial Investments					
Life Insurance (Cash Value)					
Pension/Retirement (Vested)					
IRA / 401(k)					
Annuities					
Loans from Estate					

Motor Vehicle					
Real Estate					
Home Furnishings					
Collectibles (e.g., stamps or coins)					
Jewelry					
Livestock					
Equipment					
Oil/Gas/Mineral Interest					
Other Personal Property					
List Other Assets					
TOTALS (Move these totals to Step 7)					

Have Total Assets in Step 5, Column D changed from the last day of the Prior Reporting Period or Inventory in Step 5, Column C? Yes No

Provide additional detail for any assets on the preceding schedule that were purchased during the reporting period. Include a description of the asset purchased, the purchase price, purchase date, and source of funding for the purchase (e.g. cash, loan, sale of another other asset, etc.).

Description of Asset	Purchase Price	Purchase Date	Purchase method

Provide detail for any assets on the preceding schedule that were sold during the reporting period. Include a description of the asset sold, the sale price, sale date, and use of funds proceeds from the sale (e.g. living expenses, extinguish debt, purchase of another asset, etc.).

Description of Asset	Sale Price	Sale Date	Use of Proceeds

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Please include a description of any other changes to the value of estate assets.

Step 6: Liabilities/Debts

Column A: List the last 4 digits of all account or loan numbers.

Column B: List the name of the bank or financial institution to which loans or debts are being paid.

Column C: Use amounts from the original Inventory with Financial Plan (JDF 882) **or** from the prior Conservator’s Report filed, to complete Column C marked with an asterisk (*) below.

Column D: List all *current* balances due on loans and debts.

Column E: Calculate and record the difference between Column C and Column D.

Description of Liability/Debt (Identify all accounts)	Column A Account Number (last 4-digits only)	Column B Name of Financial Institution	Column C *Balance Due on Last day of <input type="checkbox"/> Prior Reporting Period or <input type="checkbox"/> Inventory	Column D Balance Due on Last Day of of Current Reporting Period	Column E Change in Amount of Liability <i>Indicate +/-</i>
Mortgage (principal due only)					
Motor Vehicle Loan					
2 nd Mortgage/Home Improvement					
Student Loan/Tuition					
Reverse Mortgage					
HELOC					
Credit Card					
Federal Taxes					
State / Local Taxes					
Other Loan/Liability/Debt					
TOTALS (Move these totals to Step 7)					

Have Total Liabilities/Debts changed from the last day of the Prior Reporting Period or Inventory?

Yes **No** If **Yes**, explain the changes below. Please include a description of any changes or unanticipated transactions. A separate petition for approval may need to be filed with the court for significant changes outside the amounts allowed in the Inventory and Financial Plan.

Step 7: Summary

Summary of Financial Activity

	<i>*Prior Reporting Period (or Financial Plan)</i>	<i>Current Reporting Period</i>
(A) Total Receipts/Income from Step 2	\$ _____	\$ _____
(B) Total Disbursements/Expenses from Step 3	\$ _____	\$ _____
(A) minus (B) = Net Income	\$ _____	\$ _____

**Summary of Net Worth
Fair Market Value of Assets Minus Liabilities/Debts**

	<i>*Last Day of Prior Reporting Period (or Inventory)</i>	<i>Last Day of Current Reporting Period</i>
(A) Total Assets from Step 5	\$ _____	\$ _____
(B) Total Liabilities/Debts from Step 6	\$ _____	\$ _____
(A) minus (B) = Net Worth	\$ _____	\$ _____

- By checking this box, I am acknowledging I am filling in the blanks and not changing anything else on the form.
- By checking this box, I am acknowledging that I have made a change to the original content of this form.

**REPORT MUST BE SIGNED AND DATED BY ALL CONSERVATORS
AND SERVED ON THE PROTECTED PERSON AND ALL INTERESTED PARTIES
AS INDICATED BY THE ATTACHED CERTIFICATE OF SERVICE**

VERIFICATION

I declare under penalty of perjury under the law of Colorado that the foregoing is true and correct.

Executed on the _____ day of
(date)

Executed on the _____ day of
(date)

_____, _____,
(month) (year)

_____, _____,
(month) (year)

at _____
(city or other location, and state OR country)

at _____
(city or other location, and state OR country)

(printed name)

(printed name)

(Signature of Conservator/Successor)

(Signature of Co-Conservator/Successor, if any)

Attorney Signature, (if any)

Date

**IMPORTANT
THIS SECTION MUST BE COMPLETED CORRECTLY AND SIGNED
OR THE REPORT MAY BE REJECTED.**

Colorado Law **REQUIRES** that the Conservator's Report be served on the **PROTECTED PERSON AND INTERESTED PERSONS** pursuant to Order Appointing Conservator, including minors 12 years of age or older (§15-14-404(4), C.R.S.). In the space below under the Certificate of Service, list the names, addresses, and method of delivery for each party listed on the Order Appointing Conservator and provide each party with a copy of this Report.

NOTE: If you wish to change the persons entitled to receive copies of reports or other documents filed, you must file a separate motion with the court.

CERTIFICATE OF SERVICE

I certify that on _____ (date), a copy of this _____ (name of document) was served as follows on each of the following:

Name and Address	Relationship to Decedent, Ward, or Protected Person	Manner of Service*

--	--	--

*Insert one of the following: hand delivery, first-class mail, certified mail, e-service, or fax.

Signature

<input type="checkbox"/> District Court <input type="checkbox"/> Denver Probate Court _____ County, Colorado Court Address: _____ <hr/> In the Matter of the Estate of: Deceased	▲ COURT USE ONLY ▲
Attorney or Party Without Attorney (Name and Address): Phone Number: _____ E-mail: _____ FAX Number: _____ Atty. Reg. #: _____	Case Number: Division _____ Courtroom _____
APPLICATION FOR INFORMAL PROBATE OF WILL AND INFORMAL APPOINTMENT OF PERSONAL REPRESENTATIVE	

******* Use this form if the decedent left a will *******

The applicant, an interested person pursuant to § 15-10-201(27), C.R.S., makes the following statements:

1. Information about the applicant:

Name: _____ Relationship to Decedent: _____
 Street Address: _____
 City: _____ State: _____ Zip Code: _____
 Mailing Address, if different: _____
 City: _____ State: _____ Zip Code: _____
 Primary Phone: _____ Alternate Phone: _____
 Email Address: _____

2. The Decedent _____ (name) died on _____ (date) at the age of ____ years. The decedent was domiciled or resided in the City of _____ County of _____, the State of _____.

3. Venue for this proceeding is proper in this county because the decedent:
 had his or her domicile or residence in this county on the date of death.
 did not have his or her domicile or residence in Colorado, but had property located in this county on the date of death.

4. This application is filed within the time period permitted by law. Three years or less have passed since the decedent's death, or circumstances described in § 15-12-108, C.R.S. authorize tardy probate or appointment.

5. The applicant:
 has not received a Demand for Notice of Filings or Orders and is unaware of any Demand for Notice of Filings or Orders concerning the decedent.
 has received or is aware of a Demand for Notice of Filings or Orders concerning the Decedent. See attached Demand for Notice of Filings or Orders or explanation.

6. No court has appointed a personal representative and no such appointment proceeding is pending in this state or elsewhere.

A court has appointed a personal representative, or an appointment proceeding is pending in the State of _____ (Attach a statement explaining the circumstances and indicating the name and address of the personal representative. Attach a certified copy of the appointing document if the appointment has been finalized.)

7. The date of the decedent's last will is _____.

The dates of all codicils are _____.

The will and any codicils are collectively referred to as "the Will." The applicant believes that it is the decedent's last will and that it was validly executed.

Except as may be disclosed in an attached explanation and after the exercise of reasonable diligence, the applicant is unaware of any instrument revoking the will and is unaware of any prior wills relating to property in Colorado that were not expressly revoked by a later instrument.

The original will:

Was deposited with this court before the decedent's death. (§ 15-11-515, C.R.S.);

Has been delivered to this court since the decedent's death. (§ 15-11-516, C.R.S.); or

Is filed with this application.

An e-filed copy of the will is filed with this application.

The original will be delivered to the court forthwith.

The will is an electronic will executed in compliance with § 15-11-1305, C.R.S. and an e-filed copy of the will is filed with this application.

The will is an electronic will executed in compliance with § 15-11-1305, C.R.S. and a certified paper copy of the will pursuant to § 15-11-1309, C.R.S. is filed with this application.

The will has been probated in the State of _____. Authenticated copies of the will and of the statement probating it are filed with this application. (§ 15-12-402, C.R.S.)

8. Decedent's marital and family status:

a) Did a spouse or partner in a civil union survive the decedent? Yes No

b) Did the decedent have a surviving parent? Yes No

c) Did the decedent have surviving children or other descendants? Yes No

d) Does the decedent's surviving spouse or partner in a civil union have surviving descendants who are not descendants of the decedent? Yes No

e) Are all of the decedent's surviving descendants also descendants of the surviving spouse or partner in a civil union? Yes No

f) Are any of the decedent's children minors? Yes No

9. **The names and addresses of the decedent's spouse, partner in a civil union, children, other heirs and devisees are as follows:**

• If a guardian or conservator has been appointed for one of the persons listed below, also provide the name and address of the guardian or conservator.

• If a minor child is listed, list the child's parent(s), guardian or conservator.

• If a spouse, partner in a civil union, or child has predeceased the decedent, include the date of death.

• A sample of this section is included in the Instructions - JDF 906.

Name	Address or Date of Death	Age, only if Minor	Relationship (e.g. spouse, partner in a civil union, child, brother, guardian for spouse, etc.)

10. Applicant is 21 years of age or older and nominates himself/herself to be appointed as personal representative.

Or

Applicant is 21 years of age or older and nominates himself/herself to be appointed as co-personal representative along with the following as a co-personal representative.

Name: _____ The Nominee is 21 years of age or older.

Street Address: _____

City: _____ State: _____ Zip Code: _____

Mailing Address, if different: _____

City: _____ State: _____ Zip Code: _____

Primary Phone: _____ Alternate Phone: _____

Email Address: _____

Or

Applicant nominates the following person be appointed as personal representative.

Name: _____ The Nominee is 21 years of age or older.

Street Address: _____

City: _____ State: _____ Zip Code: _____

Mailing Address, if different: _____

City: _____ State: _____ Zip Code: _____

Primary Phone: _____ Alternate Phone: _____

Email Address: _____

11. The nominee has priority for appointment because of:

statutory priority. (§ 15-12-203, C.R.S.)

reasons stated in the attached explanation.

Persons with prior or equal rights to appointment are as follows:

All person(s) (other than those identified in Paragraph 10 above) with prior or equal right to appointment have renounced their right to appointment (JDF 912SC). All required renouncements accompany this application.

12. The personal representative may receive compensation.

The hourly rates to be charged, any amounts to be charged pursuant to a published fee schedule, including the rates and basis for charging fees for any extraordinary services, and any other bases upon which a fee charged to the estate will be calculated, are as stated below or in an attachment to this application. *

The basis of compensation has not yet been determined.*

* There is a continuing obligation to disclose any material changes to the basis for charging fees. (§ 15-10-602 C.R.S.)

13. The personal representative may compensate his, her, or its counsel.

The hourly rates to be charged, any amounts to be charged pursuant to a published fee schedule, including the rates and basis for charging fees for any extraordinary services, and any other bases upon which a fee charged to the estate will be calculated, are as stated below or in an attachment to this application.*

The basis of compensation has not yet been determined.*

* There is a continuing obligation to disclose any material changes to the basis for charging fees. (§ 15-10-602 C.R.S.)

14. Bond is not required by the will and no interested person demanded that bond be filed. (Skip #15 below.)

Bond is required by will or is being demanded by an interested person. (Complete #15 below.)

Bond in the amount of \$_____ has been demanded.

15. Applicant states the following regarding the decedent's estate if required by § 15-12-604, C.R.S.

Estimated value of real estate	\$
Estimated value of personal property	\$
Annual income expected from all sources	\$
TOTAL	\$

16. The applicant requests that the registrar informally admit the decedent's will to probate and that the nominee be informally appointed as personal representative in unsupervised administration to serve:

without bond with bond in the amount of \$_____

and that Letters Testamentary be issued.

- By checking this box, I am acknowledging I am filling in the blanks and not changing anything else on the form.
- By checking this box, I am acknowledging that I have made a change to the original content of this form.

VERIFICATION

I declare under penalty of perjury under the law of Colorado that the foregoing is true and correct.

Executed on the _____ day of
(date)

Executed on the _____ day of
(date)

_____, _____,
(month) (year)

_____, _____,
(month) (year)

at _____
(city or other location, and state OR country)

at _____
(city or other location, and state OR country)

(printed name)

(printed name)

(Signature of Applicant)

(Signature of Co-Applicant, if any)

Attorney Signature, (if any)

Date

Note:

- Please remember to add any AKA names in the caption, if applicable.
- [Pursuant to § 15-12-304, C.R.S. the Application must be declined if \(a\) one or more of a known series of testamentary instruments, other than a will and one or more codicils thereto, the latest of which does not expressly revoke the earlier; or \(b\) a copy of the decedent's original will certified by the State Court Administrator.](#)

District Court <input type="checkbox"/> Denver Probate Court _____ County, Colorado Court Address: _____ <hr/> In the Matter of the Estate of: Deceased	
Attorney or Party Without Attorney (Name and Address): _____ Phone Number: _____ E-mail: _____ FAX Number: _____ Atty. Reg. #: _____	▲ COURT USE ONLY ▲ Case Number: _____ Division _____ Courtroom _____
PETITION FOR FORMAL PROBATE OF WILL AND FORMAL APPOINTMENT OF PERSONAL REPRESENTATIVE	

***** Use this form if the decedent left a will *****

The petitioner, an interested person pursuant to § 15-10-201(27), C.R.S., makes the following statements:

1. Information about the petitioner:

Name: _____ Relationship to Decedent _____
 Street Address: _____
 City: _____ State: _____ Zip Code: _____
 Mailing Address, if different: _____
 City: _____ State: _____ Zip Code: _____
 Primary Phone: _____ Alternate Phone: _____
 Email Address: _____

2. The decedent, _____, died on _____ (date) at the age of ____ years. The decedent was domiciled or resided in the City of _____ County of _____, State of _____.

3. Venue for this proceeding is proper in this county because the decedent:
 had his or her domicile or residence in this county on the date of death.
 did not have his or her domicile or residence in Colorado, but had property located in this county on the date of death.

4. This petition is filed within the time period permitted by law. Three years or less have passed since the decedent's death, or circumstances described in § 15-12-108, C.R.S. authorize tardy probate or appointment.

5. The Petitioner:
 has not received a Demand for Notice of Filings or Orders and is unaware of any Demand for Notice of Filings or Orders concerning Decedent.
 has received or is aware of a Demand for Notice of Filings or Orders concerning Decedent. See attached Demand for Notice of Filings or Orders or explanation.

6. No court has appointed a personal representative and no such appointment proceeding is pending in this state or elsewhere.

A court has appointed a personal representative, or an appointment proceeding is pending in the State of _____ (Attach a statement explaining the circumstances and indicating the name and address of the personal representative. Attach a certified copy of the appointing document if the appointment has been finalized.)

7. Except as may be disclosed in an attached explanation and after the exercise of reasonable diligence, the petitioner is unaware of any instrument revoking the will and is unaware of any prior wills relating to property in Colorado that have not been expressly revoked by a later instrument.

Or

The date of the decedent's last will is _____.

The dates of all codicils are _____.

The will and any codicils are collectively referred to as "the will". The petitioner believes that it is the decedent's last will and that it was validly executed.

8. The original will:

Was deposited with this court before the decedent's death (§ 15-11-515, C.R.S.)

Has been delivered to this court since the decedent's death (§ 15-11-516, C.R.S.)

Is filed with this petition.

Other: _____

An e-filed copy of the will is filed with this petition.

The original will be delivered to the court forthwith.

The will is an electronic will executed in compliance with § 15-11-1305, C.R.S. and an e-filed copy of the will is filed with this application.

The will is an electronic will executed in compliance with § 15-11-1305, C.R.S. and a certified paper copy of the will pursuant to § 15-11-1309, C.R.S. is filed with this application.

[The will is a certified copy of the original will that has been certified by the State Court Administrator under § 15-23-116, C.R.S.](#)

The will has been probated in the State of _____. Authenticated copies of the will and of the statement probating it are filed with this petition. (§ 15-12-402, C.R.S.)

9. Decedent's marital and family status:

a) Did a spouse or partner in a civil union survive the decedent? Yes No

b) Did the decedent have a surviving parent? Yes No

c) Did the decedent have surviving children or other descendants? Yes No

d) Does the decedent's surviving spouse or partner in a civil union have surviving descendants who are not descendants of the decedent? Yes No

e) Are all of the decedent's surviving descendants also descendants of the surviving spouse or partner in a civil union? Yes No

f) Are any of the decedent's children minors? Yes No

10. The names and addresses of the decedent's spouse, partner in a civil union, children, other heirs, and devisees are as follows:

◆ If a guardian or conservator has been appointed for one of the persons listed below, also provide the name and address of the guardian or conservator.

◆ If a minor child is listed, list the child's parent(s), guardian, or conservator.

◆ If a spouse, partner in a civil union, or child has predeceased the Decedent, include the date of death.

◆ A sample of this section is included in the Instructions - JDF 906.

Name	Address or Date of Death	Age, only if Minor	Relationship (e.g. spouse, partner in a civil union, child, brother, guardian for spouse, etc.)

11. Petitioner is 21 years of age or older and nominates himself or herself to be appointed as personal representative.

Or

Petitioner is 21 years of age or older and nominates himself/herself to be appointed as co-personal representative along with the following as a co-personal representative.

Name: _____ The Nominee is 21 years of age or older.

Street Address: _____

City: _____ State: _____ Zip Code: _____

Mailing Address, if different: _____

City: _____ State: _____ Zip Code: _____

Primary Phone: _____ Alternate Phone: _____

Email Address: _____

Or

Petitioner nominates the following person be appointed as Personal Representative.

Name: _____ The Nominee is 21 years of age or older.

Street Address: _____

City: _____ State: _____ Zip Code: _____

Mailing Address, if different: _____

City: _____ State: _____ Zip Code: _____

Primary Phone: _____ Alternate Phone: _____

Email Address: _____

12. The nominee has priority for appointment because of:

- Statutory priority. (§ 15-12-203, C.R.S.)
- Reasons stated in the attached explanation.

Persons with prior or equal right to appointment are as follows:

All person(s) (other than those identified in Paragraph 11 above) with prior or equal right to appointment have renounced their right to appointment (JDF 912SC). All required renuncements accompany this petition.

13. Bond is not required by the will and no interested person demanded that bond be filed. (Skip #14 below.)
- Bond is required by will or is being demanded by an interested person. (Complete #14 below.)
- Bond in the amount of \$ _____ has been demanded.

14. Petitioner states the following regarding the decedent's estate, if required by § 15-12-604, C.R.S.

Estimated value of real estate	\$
Estimated value of personal property	\$
Annual income expected from all sources	\$
TOTAL	\$

15. The personal representative may receive compensation.

- The hourly rates to be charged, any amounts to be charged pursuant to a published fee schedule, including the rates and basis for charging fees for any extraordinary services, and any other bases upon which a fee charged to the estate will be calculated, are as stated below or in an attachment to this petition. *

- The basis of compensation has not yet been determined.

* There is a continuing obligation to disclose any material changes to the basis for charging fees. (§ 15-10-602 C.R.S.)

16. The personal representative may compensate his, her, or its counsel.

- The hourly rates to be charged, any amounts to be charged pursuant to a published fee schedule, including the rates and basis for charging fees for any extraordinary services, and any other bases upon which a fee charged to the estate will be calculated, are as stated below or in an attachment to this petition. *

- The basis of compensation has not yet been determined.

* There is a continuing obligation to disclose any material changes to the basis for charging fees. (§ 15-10-602 C.R.S.)

17. Unsupervised administration is requested.

Supervised administration is requested (additional filing fee required). Terms of the requested supervision are as follows:

After notice and hearing, the petitioner requests that the court formally admit the decedent's will to probate, determine the heirs of the decedent and formally appoint the nominee as personal representative to serve:

without bond with bond in the amount of _____.

in unsupervised administration in supervised administration (additional filing fee required)

and that Letters Testamentary be issued to the personal representative or that previously issued Letters be confirmed. The petitioner also requests:

a setting aside of prior informal findings as to testacy.

a setting aside of prior informal appointment of personal representative.

other: _____

By checking this box, I am acknowledging I am filling in the blanks and not changing anything else on the form.

By checking this box, I am acknowledging that I have made a change to the original content of this form.

VERIFICATION

I declare under penalty of perjury under the law of Colorado that the foregoing is true and correct.

Executed on the _____ day of _____
(date)

Executed on the _____ day of _____
(date)

_____, _____
(month) (year)

_____, _____
(month) (year)

at _____
(city or other location, and state OR country)

at _____
(city or other location, and state OR country)

(printed name)

(printed name)

(Signature of Petitioner)

(Signature of Co-Petitioner, if any)

Attorney Signature, (if any)

Date

Note:

- Please remember to add any AKA names in the caption, if applicable.

<input type="checkbox"/> District Court <input type="checkbox"/> Denver Probate Court _____ County, Colorado Court Address: <hr/> In the Matter of the Estate of: Deceased	▲ COURT USE ONLY ▲ <hr/> Case Number: Division: _____ Courtroom: _____
ORDER ADMITTING WILL TO FORMAL PROBATE AND FORMAL APPOINTMENT OF PERSONAL REPRESENTATIVE	

Upon consideration of the Petition for Formal Probate of Will and Formal Appointment of Personal Representative filed by _____ (petitioner) on _____ (date),

THE COURT FINDS, DETERMINES, AND ORDERS:

1. The petitioner is an interested person and has filed a complete and verified petition.
2. The decedent died on _____ (date) and 120 hours have elapsed since the decedent's death.
3. The decedent was domiciled or resided in the City of _____ County of _____, State of _____.
4. Venue is proper in this county.
5. The petition was filed within the time period permitted by law.
6. Any required notices have been given or waived.
7. The decedent left a will dated _____.
 The dates of all codicils are _____.
 The will and any codicils are referred to as the will.
 The original will, electronic will executed in compliance with § 15-11-1305, C.R.S., [certified by the State Court Administrator under § 15-23-116, C.R.S.](#), and/or e-filed copy of the duly executed, unrevoked will is in the registrar's possession.
 There are no known prior wills that have not been expressly revoked by a later instrument.
 The will is admitted to formal probate.
 The prior informal finding as to testacy is set aside.

8. The heirs of the decedent are:

Name	Relationship (e.g. spouse, partner in a civil union, child, brother, guardian for spouse, etc.)

9. The following person is qualified to serve and is appointed or confirmed as personal representative:

Name: _____ The Nominee is 21 years of age or older.

Street Address: _____

City: _____ State: _____ Zip Code: _____

Mailing Address, if different: _____

City: _____ State: _____ Zip Code: _____

Primary Phone: _____ Alternate Phone: _____

Email Address: _____

The prior informal appointment of _____ (name) is set aside and the letters are revoked.

10. The personal representative will serve

without bond.

with bond in the amount of \$_____.

in unsupervised administration.

in supervised administration as described in an attachment to this order.

11. Letters Testamentary will be issued or previously issued letters are confirmed.

Date: _____

 Judge Magistrate

<input type="checkbox"/> District Court <input type="checkbox"/> Denver Probate Court _____ County, Colorado Court Address: _____ <hr/> In the Matter of the Estate of: Deceased	
Attorney or Party Without Attorney (Name and Address): _____ Phone Number: _____ E-mail: _____ FAX Number: _____ Atty. Reg. #: _____	▲ COURT USE ONLY ▲ Case Number: _____ Division Courtroom
PETITION FOR FORMAL APPOINTMENT OF SPECIAL ADMINISTRATOR PURSUANT TO § 15-12-614, C.R.S.	

The petitioner, an interested person pursuant to § 15-10-201(27), C.R.S., makes the following statements:

1. Information about the petitioner:

Name: _____ Relationship to Decedent _____
 Street Address: _____
 City: _____ State: _____ Zip Code: _____
 Mailing Address, if different: _____
 City: _____ State: _____ Zip Code: _____
 Primary Phone: _____ Alternate Phone: _____
 Email Address: _____

2. The decedent, _____, died on _____ (date) at the age of ____ years. The decedent was domiciled or resided in the City of _____ County of _____, State of _____.

3. Venue for this proceeding is proper in this county because the decedent:
 had his or her domicile or residence in this county on the date of death.
 did not have his or her domicile or residence in Colorado, but had property located in this county on the date of death.

4. This petition is filed within the time period permitted by law. Three years or less have passed since the decedent's death, or circumstances described in § 15-12-108, C.R.S. authorize tardy probate or appointment.

5. The petitioner:
 has not received a Demand for Notice of Filings or Orders and is unaware of any Demand for Notice of Filings or Orders concerning Decedent.
 has received or is aware of a Demand for Notice of Filings or Orders concerning Decedent. See attached Demand for Notice of Filings or Orders or explanation.

6. No court has appointed a personal representative and no such appointment proceeding is pending in this state or elsewhere.

A court has appointed a personal representative or an appointment proceeding is pending in the State of _____ . (Attach a statement explaining the circumstances and indicating the name and address of the personal representative. Attach a certified copy of the appointing document if the appointment has been finalized.)

7. Except as may be disclosed in an attached explanation and after the exercise of reasonable diligence, the petitioner is unaware of any instrument revoking the will and is unaware of any prior wills relating to property in Colorado that have not been expressly revoked by a later instrument.

or

The date of the decedent's last will is _____ .

The dates of all codicils are _____ .

The will and any codicils collectively are referred to as "the will." The petitioner believes that it is the decedent's last will and that it was validly executed.

8. The original will:

W was deposited with this court before the decedent's death (§ 15-11-515, C.R.S.)

H has been delivered to this court since the decedent's death (§ 15-11-516, C.R.S.)

I is filed with this petition.

An e-filed copy of the will is filed with this petition.

The original will be delivered to the court forthwith.

The will is an electronic will executed in compliance with § 15-11-1305, C.R.S. and an e-filed copy of the will is filed with this petition.

The will is an electronic will executed in compliance with § 15-11-1305, C.R.S. and a certified paper copy of the will pursuant to § 15-11-1309, C.R.S. is filed with this petition.

The will is a certified copy of the original will that has been certified by the State Court Administrator under § 15-23-116, C.R.S.

The will has been probated in the State of _____ . Authenticated copies of the will and of the statement probating it are filed with this petition. (§ 15-12-402, C.R.S.)

9. Decedent's marital and family status:

a) Did a spouse or partner in a civil union survive the decedent? Yes No

b) Did the decedent have a surviving parent? Yes No

c) Did the decedent have surviving children or other descendants? Yes No

d) Does the decedent's surviving spouse or partner in a civil union have surviving descendants who are not descendants of the decedent? Yes No

e) Are all of the decedent's surviving descendants also descendants of the surviving spouse or partner in a civil union? Yes No

f) Are any of the decedent's children minors? Yes No

10. List names and addresses of decedent's spouse, partner in a civil union, children, heirs and devisees.

◆ If a guardian or conservator has been appointed for one of the persons listed below, also provide the name and address of the guardian or conservator.

◆ If a minor child is listed, list the child's parent(s), guardian or conservator.

◆ If a spouse, partner in a civil union, or child has predeceased the decedent, include the date of death.

Name	Address or date of death	Age, only if Minor	Relationship (e.g. spouse, partner in a civil union, child, brother, guardian for spouse, etc.)

11. Petitioner requests appointment of a special administrator to preserve the estate or to secure its proper administration for the following reasons: (§ 15-12-614(1)(b), C.R.S.)

12. Petitioner is 21 years of age or older and nominates himself or herself to be appointed as special administrator.

Or

Petitioner nominates the following person be appointed as special administrator.

Name: _____ The Nominee is 21 years of age or older.

Street Address: _____

City: _____ State: _____ Zip Code: _____

Mailing Address, if different: _____

City: _____ State: _____ Zip Code: _____

Primary Phone: _____ Alternate Phone: _____

Email Address: _____

13. The nominee has priority for appointment because of:

statutory priority (§§ 15-12-203, 15-12-615, and 15-12-621(9), C.R.S.)

reasons stated in the attached explanation

The persons with prior or equal right to appointment are _____(name).

All persons with prior or equal right to appointment have executed a required renouncement that accompanies this application.

No notice has been given because an emergency exists and appointment should be made immediately.

14. Petitioner states the following regarding the decedent's estate. (§ 15-12-604, C.R.S.)

Estimated value of real estate	\$
Estimated value of personal property	\$
Annual income expected from all sources	\$
TOTAL	\$

15. The special administrator may receive compensation.

The hourly rates to be charged, any amounts to be charged pursuant to a published fee schedule, including the rates and basis for charging fees for any extraordinary services, and any other bases upon which a fee charged to the estate will be calculated, are as stated below or in an attachment to this petition. *

The basis of compensation has not yet been determined.

* There is a continuing obligation to disclose any material changes to the basis for charging fees. (§ 15-10-602 C.R.S.)

16. The special administrator may compensate his, her or its counsel.

The hourly rates to be charged, any amounts to be charged pursuant to a published fee schedule, including the rates and basis for charging fees for any extraordinary services, and any other bases upon which a fee charged to the estate will be calculated, are as stated below or in an attachment to this petition. *

The basis of compensation has not yet been determined.

* There is a continuing obligation to disclose any material changes to the basis for charging fees. (§ 15-10-602 C.R.S.)

17. Bond is not required by the will (if any) nor has any interested person demanded that bond be filed.

Bond in the amount of \$ _____ has been demanded.

After notice and hearing, the petitioner requests that the court formally appoint the nominee as special administrator to serve:

without bond. with bond in the amount of \$ _____

and that Letters of Special Administration be issued.

By checking this box, I am acknowledging I am filling in the blanks and not changing anything else on the form.

By checking this box, I am acknowledging that I have made a change to the original content of this form.

VERIFICATION

I declare under penalty of perjury under the law of Colorado that the foregoing is true and correct.

Executed on the _____ day of
(date)

Executed on the _____ day of
(date)

_____, _____,
(month) (year)

_____, _____,
(month) (year)

at _____
(city or other location, and state OR country)

at _____
(city or other location, and state OR country)

(printed name)

(printed name)

(Signature of Petitioner)

(Signature of Co-Petitioner, if any)

Attorney Signature, (if any)

Date

Note:

- Please remember to add any AKA names in the caption, if applicable.

<input type="checkbox"/> District Court <input type="checkbox"/> Denver Probate Court _____ County, Colorado Court Address: _____ <hr/> In the Matter of the Estate of: Deceased	▲ COURT USE ONLY ▲
Attorney or Party Without Attorney (Name and Address): _____ Phone Number: _____ E-mail: _____ FAX Number: _____ Atty. Reg. #: _____	Case Number: _____ Division Courtroom
INFORMATION OF APPOINTMENT	

Important Notice

The court will not routinely review or adjudicate matters unless it is specifically requested to do so by a beneficiary, creditor, or other interested person. All interested persons, including beneficiaries and creditors, have the responsibility to protect their own rights and interests in the estate in the manner provided by the provisions of the Colorado Probate Code, § 15-10-101, et seq., C.R.S. by filing an appropriate pleading with the court by which the estate is being administered and serving it on all interested persons pursuant to § 15-10-401, C.R.S. All interested persons have the right to obtain information about the estate by filing a Demand for Notice pursuant to § 15-12-204, C.R.S.

To the heirs and devisees who have or may have an interest in this estate:

1. The decedent died on _____ (date).

2. The decedent left no will.
 The decedent left a will dated _____. The dates of all codicils are _____.

 The will and any codicils were admitted to probate on _____ (date).

3. Proceedings in this matter are informal.
 Proceedings in this matter are formal.

4. _____ (name) was appointed as personal representative on _____ (date).
 Pursuant to § 15-12-705(1)(a), C.R.S., the personal representative's address is as follows:
 Street Address: _____
 City: _____ State: _____ Zip Code: _____
 Mailing Address (if different than the street address):

5. No bond has been filed with this court.
 Bond has been filed with this court in the amount of \$ _____.

6. Administration of this estate is unsupervised. The court will consider ordering supervised administration if requested by an interested person. (§ 15-12-501, et. seq., C.R.S.)

Administration of this estate is supervised.

7. This Information of Appointment is being sent to persons who have or may have some interest in the estate being administered.
8. Papers relating to this estate, including an inventory of estate assets, are either on file with this court or, if not, papers may be obtained by interested persons from the personal representative. (§§ 15-12-705, C.R.S. and 15-12-706(2), C.R.S.)
9. Interested persons are entitled to receive an accounting. (§§ 15-12-1001 to 15-12-1003, C.R.S.)
10. The surviving spouse, partner in a civil union, minor children ~~under twenty-one years of age~~, and/or dependent children may be entitled to exempt property and a family allowance if a request for payment is made in the manner and within the time limits prescribed by statutes. (§ 15-11-401, et. seq., C.R.S.)
11. The surviving spouse or partner in a civil union may have a right of election to take a portion of the augmented estate if a petition is filed within the time limits prescribed by statute. (§ 15-11-201, et seq., C.R.S.)
12. Any individual who has knowledge that there is or may be an intention to use an individual's genetic material to create a child and that the birth of the child could affect the distribution of the decedent's estate should give written notice of such knowledge to the personal representative of the decedent's estate.
- ~~13.~~ Any individual who has knowledge that there is a valid, unrevoked designated beneficiary agreement in which the decedent granted the right of intestate succession should give written notice of such knowledge to the personal representative of the decedent's estate.
- ~~14.~~ 13.

VERIFICATION

I declare under penalty of perjury under the law of Colorado that the foregoing is true and correct.

Executed on the _____ day of _____, _____, at _____
(date) (month) (year) (city or other location, and state OR country)

at _____
(city or other location, and state OR country)

(printed name)

(Signature of Person Giving Notice or Attorney for Person Giving Notice)

Attorney Signature, (if any) Date

I declare under penalty of perjury under the law of Colorado that the foregoing is true and correct.

Executed on the _____ day of _____, _____, at _____
(date) (month) (year) (city or other location, and state OR country)

(printed name)

(Signature of Person Giving Notice or Attorney for Person Giving Notice)

Attorney Signature, (if any)

Date

CERTIFICATE OF SERVICE

I certify that on _____ (date), a copy of this _____ (name of document) was served as follows on each of the following:

Name and Address	Relationship to Decedent, Ward, or Protected Person	Manner of Service*

*Insert one of the following: hand delivery, first-class mail, certified mail, e-service, or fax.

Signature

Note:

- This Information of Appointment must be given within 30 days of appointment of the personal representative. In the event a will exists but there has been no formal testacy proceeding and the personal representative was appointed on the assumption of intestacy, this Information of Appointment must also be given to the devisees named in any existing wills. A copy of this Information of Appointment and Certificate of Service must be promptly filed with the Court (§ 15-12-705, C.R.S.).

CERTIFICATE OF SERVICE

I certify that on _____ (date), a copy of this _____ (name of document) was served as follows on each of the following:

Name and Address	Relationship to Decedent, Ward, or Protected Person	Manner of Service*

*Insert one of the following: hand delivery, first-class mail, certified mail, e-service, or fax.

Signature

Note:

- Upon the filing of this document, unless otherwise ordered by the court, the court's Notice and Order Closing Estate After Three years will be set aside without further action by the court.

<input type="checkbox"/> District Court <input type="checkbox"/> Denver Probate Court _____ County, Colorado Court Address: <hr/> In the Matter of the Estate of: Deceased	▲ COURT USE ONLY ▲ <hr/> Case Number: Division Courtroom
NOTICE AND ORDER CLOSING ESTATE AFTER THREE YEARS OR MORE	

To: _____ (attorney or personal representative)

This matter is before the court on the court's own motion.

It appears to the court that no action has been taken in the above-captioned estate for three years or more. Unless you show good cause why the court should not do so within ~~30~~35 days from the date of this order, the court will close this estate and terminate the personal representative's appointment without further accounting, notice, report, hearing, or order. (§ 15-12-1009, C.R.S.)

If the administration of the estate is complete, no response is required. If the administration of the estate is not complete, the personal representative or attorney may file a Response (JDF 970) with the court.

Neither the personal representative nor any other person is discharged from any liability to this estate, the court or any other person, except that sureties upon any bond posted in these proceedings must be released as to any claim arising after closure of this estate pursuant to this order.

Date: _____

_____ Judge Magistrate Registrar

<input type="checkbox"/> District Court <input type="checkbox"/> Denver Probate Court _____ County, Colorado Court Address: _____ In the Matter of the Estate of: Deceased	▲ COURT USE ONLY ▲
Attorney or Party Without Attorney (Name and Address): _____ Phone Number: _____ E-mail: _____ FAX Number: _____ Atty. Reg.#: _____	Case Number: _____ Division Courtroom
PETITION TO RE-OPEN ESTATE	

The petitioner makes the following statements:

1. Information about the petitioner:

Name: _____ Relationship to Decedent _____
 Street Address: _____
 City: _____ State: _____ Zip Code: _____
 Mailing Address, if different: _____
 City: _____ State: _____ Zip Code: _____
 Primary Phone: _____ Alternate Phone: _____
 Email Address: _____

2. Pursuant to § 15-12-1008, C.R.S., the estate has been settled and the personal representative has been discharged or one year has passed since the closing statement has been filed with the court.

OR

Pursuant to § 15-12-1009, C.R.S., the court, on its own motion and after notice, entered an order closing the estate without further accounting.

3. Petitioner desires to re-open the estate:

to distribute property briefly described as:

other:

4. Petitioner nominates the following person to be appointed as personal representative:

Name: _____

Street Address: _____

City: _____ State: _____ Zip Code: _____

Mailing Address, if different: _____

City: _____ State: _____ Zip Code: _____ Primary Phone: _____

Alternate Phone: _____

Email Address: _____

The nominee is the previously appointed personal representative.

The previously appointed personal representative is unable or unwilling to serve and the nominee is 21 years of age or older, and the nominee has priority for appointment because of:

Nomination by the will.

Statutory priority. (§ 15-12-203, C.R.S.)

reasons stated below:

Persons with prior or equal rights to appointment have renounced their rights to appointment or have been given notice of these proceedings. **Any required renouncements accompany this petition.**

5. The persons to receive distribution have changed, as identified below:

Name	Address or Date of Death	Age, only if Minor	Relationship (e.g. spouse, partner in a civil union, child, brother, guardian for spouse, etc.)

The persons to receive distribution have not changed from the original proceedings. Distribution is as follows:

Name of Person Receiving Distribution	Address of Person Receiving Distribution	Description of Distribution

6. The personal representative may receive compensation.

The hourly rates to be charged, any amounts to be charged pursuant to a published fee schedule, including the rates and basis for charging fees for any extraordinary services, and any other bases upon which a fee charged to the estate will be calculated, are as stated below or in an attachment to this application.

The basis of compensation has not yet been determined.

7. The personal representative may compensate his, her, or its counsel.

The hourly rates to be charged, any amounts to be charged pursuant to a published fee schedule, including the rates and basis for charging fees for any extraordinary services, and any other bases upon which a fee charged to the estate will be calculated, are as stated below or in an attachment to this application.

The basis for compensation has not yet been determined.

8. **Petitioner requests that the court, after such notice as it may direct, re-open the estate and appoint the personal representative identified in section 4 above. In addition, the petitioner requests the court:**

issue Letters of Administration.

issue Letters Testamentary.

upon reporting to the court that the above purposes have been accomplished, ~~discharge~~ the personal representative's appointment shall terminate and estate re-closed ~~the estate~~.

Other: _____

By checking this box, I am acknowledging I am filling in the blanks and not changing anything else on the form.

By checking this box, I am acknowledging that I have made a change to the original content of this form.

VERIFICATION

I declare under penalty of perjury under the law of Colorado that the foregoing is true and correct.

Executed on the _____ day of
(date)

Executed on the _____ day of
(date)

_____, _____
(month) (year)

_____, _____
(month) (year)

at _____
(city or other location, and state OR country)

at _____
(city or other location, and state OR country)

(printed name)

(printed name)

(Signature of Petitioner)

(Signature of Co-Petitioner, if any)

Attorney Signature, (if any)

Date

2. It is further ordered that the personal representative send an Information of Appointment (JDF 940) to the following parties:

The same as for the initial appointment of personal representative in this case; or

Name	Relationship to Decedent

3. Upon reporting to this court that the personal representative has accomplished the above purposes, the appointment of the personal representative ~~must be discharged~~ shall terminate, and this estate shall be re-closed.

4. Other: _____

Date: _____

 Judge Magistrate Registrar

<input type="checkbox"/> District Court <input type="checkbox"/> Denver Probate Court _____ County, Colorado Court Address: _____ <hr/> In the Interest of: Ward/Protected Person	▲ COURT USE ONLY ▲ <hr/> Case Number: _____ Division: _____ Courtroom: _____
FINAL ORDER ACCEPTING <input type="checkbox"/> GUARDIANSHIP <input type="checkbox"/> CONSERVATORSHIP IN COLORADO FROM SENDING STATE PURSUANT TO §15-14.5-302, C.R.S. UNIFORM ADULT GUARDIANSHIP AND PROTECTIVE PROCEEDINGS JURISDICTION ACT	

The court has received the Final Order Confirming Transfer from _____ (state) and:

The court appoints the following person as Guardian, Guardian and Conservator, N/A:

Name: _____
 Street Address: _____
 City: _____ State: _____ Zip Code: _____
 Mailing Address, if different: _____
 City: _____ State: _____ Zip Code: _____
 Primary Phone : _____ Alternate Phone : _____
 Email Address: _____

The court appoints the following person as Conservator, N/A:

Name: _____
 Street Address: _____
 City: _____ State: _____ Zip Code: _____
 Mailing Address, if different: _____
 City: _____ State: _____ Zip Code: _____
 Primary Phone : _____ Alternate Phone : _____
 Email Address: _____

Pursuant to § 15-14.5-302(6), C.R.S., no later than 90 days after issuance of this Order, the court shall determine whether the guardianship and/or conservatorship needs to be modified to conform with Colorado law. Pursuant to § 15-14.5-302(7), C.R.S., in granting the petition for transfer, the court recognizes the guardianship and/or conservatorship order from the other state, including the determination of the ward or protected person's incapacity and the appointment of guardian and/or conservator.

Therefore, the court orders the following:

1. The guardian and/or conservator must promptly notify the court if the guardian's and/or conservator's street address, email address, or phone number changes or of any change of address for the ward and/or protected person.

2. The following shall apply based on the appointment of a guardian:

- a. The guardian may not establish or move the ward's custodial dwelling outside the State of Colorado without a court order.
- b. The guardian must file the initial Guardian's Report - Adult (JDF 850) by _____ (date 60 days from appointment) and must file an Annual Guardian's Report (JDF 850) by each _____ (date) beginning in _____ (year) for the duration of the guardianship.
- c. The guardian must manage the day-to-day finances for the support, care, education, health and welfare of the ward. The guardian is required to maintain supporting documentation for all receipts and all disbursements during the duration of this appointment. The court further orders the following:

- d. Medical powers of attorney, whether executed prior to or following the entry of this order, are terminated, except as follows:

- e. The guardian is authorized to access the ward's medical records and information. The guardian is deemed to be ward's personal representative for all purposes relating to ward's protected health information, as provided in HIPAA, Section 45 CFR 164.502(g)(2).
- f. The guardian does not have the authority to obtain hospital or institutional care and treatment for mental illness, developmental disability, alcoholism or substance abuse against the will of the ward.
- g. If the ward is an "at risk elder" or "at risk adult with an intellectual and developmental disability," and if the guardian has reasonable cause to believe that the ward has been abused or exploited or is at imminent risk of abuse or exploitation, the guardian is required to make a report to law enforcement within 24 hours after the observation or discovery pursuant to C.R.S. § 18-6.5-108(1)(b)(XII).

3. The following shall apply based on the appointment of a conservator:

- a. The conservator must file for approval with the court a Conservator's Financial Plan with Inventory (JDF 882) on or before _____ (date within 90 days from appointment). The value of the assets must be reported as of the date of this order.
- b. The conservator must file a Conservator's Report (JDF 885) with the court each year on or before _____ (date). The time period covered in the report will begin on _____ (date) and end on _____ (date). The conservator is required to maintain all supporting documentation, including receipts and disbursements.
- c. All financial powers of attorney, whether executed prior to or following the entry of this order, are terminated, except as follows:

- d. The conservator shall:
 - serve without bond for the following reason(s):

 - serve with bond in the amount of \$ _____. The bond must be posted with the Court by _____ (date). If bond is posted by a surety, notice of any proceeding must be provided to the surety.

4. Within 30 days of appointment, the guardian and/or conservator must provide a copy of this Final Order to the ward or protected person and persons given notice of the Petition and must advise those persons using Notice of Appointment of Guardian and/or Conservator (JDF 812) that they have the right to request termination or modification of the conservatorship. See §§ 15-14-311 or 15-14-409, C.R.S.
5. Copies of all future court filings must be provided to the following interested persons:

Name of Interested Person	Relationship to Ward/Protected Person
	Ward/Protected Person
	Spouse or partner in a civil union
	Adult Children
	Parents
	Guardian
	Conservator

6. The court directs the issuance of Letters of Guardianship as follows:
- The powers and duties of the guardian are unrestricted.
- OR**
- The powers and duties of the guardian are limited by the following restrictions:
- _____
- _____
- _____

7. The court directs the issuance of Letters of Conservatorship as follows:
- The conservator may exercise all the powers granted in. § 15-14-425, C.R.S., subject to the exclusions in § 15-14-411, C.R.S. The powers and duties of the conservator are otherwise unrestricted.
- OR**
- The powers and duties of the conservator are limited by the following restrictions, if any: _____
- _____
- _____
- The conservator must not, without prior court order, convey or encumber any real estate owned by the protected person.

To ensure notice of this prohibition, the conservator must record the letters evidencing appointment with the Clerk & Recorder of the County in which such real estate is located. The conservator must provide proof of the recording to the court.

8. **The court further orders:**
- _____
- _____
- _____

Date: _____

_____ Judge Magistrate

6. I understand that as a court-appointed guardian and/or conservator, I am required by law to report any known or suspected abuse, neglect, or exploitation of any at-risk elder (a person 70 years of age or older) to law enforcement. I understand that criminal penalties may result from failure to comply with this law. Please refer to § 18-6.5-108, C.R.S. for additional information.
7. I understand that all reports must be filed on the most current version of the form and that the forms are available on the state court website: <http://www.courts.state.co.us>

- By checking this box, I am acknowledging I am filling in the blanks and not changing anything else on the form.
- By checking this box, I am acknowledging that I have made a change to the original content of this form.

My signature below indicates that I have read and understand my responsibilities as a newly appointed guardian and/or conservator.

VERIFICATION

I declare under penalty of perjury under the law of Colorado that the foregoing is true and correct.

Executed on the _____ day of
(date)

Executed on the _____ day of
(date)

_____, _____,
(month) (year)

_____, _____,
(month) (year)

at _____
(city or other location, and state OR country)

at _____
(city or other location, and state OR country)

(printed name)

(printed name)

(Signature of Guardian/Conservator/Successor)

(Signature of Co-Guardian/Co-Conservator/Successor, if any)

<input type="checkbox"/> District Court <input type="checkbox"/> Denver Probate Court _____ County, Colorado Court Address: <hr/> In the Interest of: Respondent	
▲ COURT USE ONLY ▲	
Attorney or Party Without Attorney (Name and Address): Phone Number: E-mail: FAX Number: Atty. Reg. #:	Case Number: Division Courtroom
ACCEPTANCE OF OFFICE – GUARDIANSHIPS AND CONSERVATORSHIPS	

1. I, _____ (name), accept appointment to, and agree to perform the duties and discharge the trust of, the office of (check all that apply):
 - Guardian.
 - Emergency guardian.
 - Temporary guardian.
 - Conservator.
 - Special conservator.

2. I submit personally to the jurisdiction of this court in any proceeding relating to this matter.

3. A legible copy of my driver's license, passport, or other government-issued identification is filed/e-filed as a separate document.

4. I request that the court waive required background information because I am (if this paragraph applies, check all boxes below that apply, and skip questions 5 through 9):
 - a public administrator.
 - a trust company, bank, credit union, savings and loan, or other financial institution.
 - a state or county agency.
 - the respondent's parent, and I reside with the respondent.
 - a person or entity for whom good cause exists to waive such disclosures. State reasons of good cause:

5. I have have not been convicted of, pled no contest to, or received a deferred sentence for one or more felonies or misdemeanors. If so, describe all:

Name of State and Court Issuing Order

6. I have have not had a temporary or permanent civil restraining/protection order issued against me. If so, describe all:

Name of State and Court Issuing Order

7. A civil judgment has has not been entered against me. If so, describe all:

Name of State and Court Entering Judgment

8. I have have not been relieved from one or more court-appointed responsibilities. If so, describe all:

Name of State and Court Relieving Nominee

9. Copies of my name-based criminal history record check obtained through the Colorado Bureau of Investigation and my current credit report are filed/e-filed as separate documents. (See instructions below.)

10. I am am not a "professional" which is defined as: an individual or entity engaged in the business of providing services as guardian or conservator, who is not related to the respondent by blood, law, or marriage. A professional usually acts as guardian or conservator for two or more individuals.

11. I acknowledge and understand that if I am appointed to serve as guardian and/or conservator and fail to file required reports or plans with the court or fail to respond to an order of the court to show cause why I should not be held in contempt of court, Colorado law authorizes the court to access data and records of state agencies in order to obtain contact information, as defined in §§15-14-317(4)(c) and 15-14-420(6)(c), C.R.S.

Note: Social security numbers should not be attached to or written on this Acceptance of Office.

- By checking this box, I am acknowledging I am filling in the blanks and not changing anything else on the form.
 By checking this box, I am acknowledging that I have made a change to the original content of this form.

VERIFICATION

I declare under penalty of perjury under the law of Colorado that the foregoing is true and correct.

Executed on the _____ day of _____, _____,
(date) (month) (year)

at _____
(city or other location, and state OR country)

(printed name)

(signature)

Notes

- To obtain a name-based criminal history check from the Colorado Bureau of Investigation (CBI), contact CBI: 690 Kipling Street, Suite 3000, Lakewood, CO 80215; (303) 239-4208; or at www.colorado.gov/cbi. For online search requests: go to www.cbirecordscheck.com. The cost may be less and response time may be faster than written request. Credit card payment is required.
- To obtain a current credit report, contact any of the following credit reporting agencies:
 - a) Equifax Credit Information Services, Inc.; P.O. Box 740241, Atlanta, GA 30374; 1-800-685-1111; or www.equifax.com ;
 - b) Experian; 1-888-397-3742; or www.experian.com ; or
 - c) TransUnion, Annual Credit Report Request Service; P.O. Box 105281, Atlanta, GA 30348; 1-877-322-8228; or www.transunion.com .
- § 15-14-110, C.R.S., requires that the costs for all criminal history checks and credit reports be paid by the proposed guardian/conservator (nominee).
- § 15-14-110(5)(a), C.R.S., nothing in this section prohibits the court from requiring the nominee to obtain additional background information as the court deems necessary to assist in determining the fitness of the nominee, including requiring the nominee to obtain fingerprint-based criminal history checks through the Colorado Bureau of Investigation and Federal Bureau of Investigation.
- § 15-14-110(5)(b), C.R.S., requires the court to order the nominee to submit to a name-based judicial record check, as defined in § 22-2-119.3(6)(d), when the results of a fingerprint-based criminal history record check reveal the nominee has a record of arrest without a disposition.

<input type="checkbox"/> District Court <input type="checkbox"/> Denver Probate Court _____ County, Colorado Court Address: _____ In the Interest of: Minor	▲ COURT USE ONLY ▲
Attorney or Party Without Attorney (Name and Address): Phone Number: _____ E-mail: _____ FAX Number: _____ Atty. Reg. #: _____	Case Number: Division Courtroom
PETITION FOR CONFIRMATION OF APPOINTMENT OF GUARDIAN PURSUANT TO § 15-14-202(6), C.R.S.	

I, _____ (name of appointed guardian), hereby petition the court to confirm my appointment as guardian and state the following:

1. The Affidavit of Acceptance of Appointment by Written Instrument as Guardian for Minor Pursuant to § 15-14-202, C.R.S. (JDF 821) was filed with the court on _____ (date) and this petition is filed within 30 calendar days from said filing date.
2. The minor, if 12 years of age or older, has or has not consented to the appointment of the guardian and the verified Consent or Nomination of Minor (JDF 826) has been filed with the court.
3. The appointed guardian believes that the confirmation is in the best interest of the minor.
4. This petition and the Affidavit of Acceptance of Appointment (JDF 821) has been given to the following persons (all applicable must be given notice):
 - Appointing parent or guardian, if living.
 - All adults with whom the minor is currently residing.
 - All adults who had care and custody of the minor in the last 60 days.
 - The minor, if 12 years of age or older.
5. Regarding the Indian Child Welfare Act (ICWA):
 - I am aware of the child or child's relatives having American Indian/Native American or Alaska Native heritage.

Name of tribe(s) _____

NOTE: If you checked that you are aware of the child or child's relatives having any American Indian/Native American or Alaska Native heritage, you must complete and file with the court, JDF 1350 – Indian Child Welfare Act (ICWA) Assessment Form.

I am not aware of the child or child's relatives having any American Indian/Native American or Alaska Native heritage.

NOTE: If you checked that you are not aware of the child or child's relatives having any American Indian/Native American or Alaska Native heritage, you must complete and file JDF 1351 – American Indian/Alaska Native Indian Child Welfare Act (ICWA) Declaration of Non-Indian Heritage.

- By checking this box, I am acknowledging I am filling in the blanks and not changing anything else on the form.
- By checking this box, I am acknowledging that I have made a change to the original content of this form.

VERIFICATION

I declare under penalty of perjury under the law of Colorado that the foregoing is true and correct.

Executed on the _____ day of
(date)

Executed on the _____ day of
(date)

_____, _____,
(month) (year)

_____, _____,
(month) (year)

at _____
(city or other location, and state OR country)

at _____
(city or other location, and state OR country)

(printed name)

(printed name)

(Signature of Petitioner)

(Signature of Co-Petitioner, if any)

Attorney Signature, (if any)

Date

CERTIFICATE OF SERVICE

I certify that on _____ (date), a copy of this _____ (name of document) was served as follows on each of the following:

Name and Address	Relationship to Decedent, Ward, or Protected Person	Manner of Service*

*Insert one of the following: hand delivery, first-class mail, certified mail, e-service, or fax.

Signature

<input type="checkbox"/> District Court <input type="checkbox"/> Denver Probate Court _____ County, Colorado Court Address: <hr/> In the Interest of: Minor	▲ COURT USE ONLY ▲
Attorney or Party Without Attorney (Name and Address): Phone Number: E-mail: FAX Number: Atty. Reg. #:	Case Number: Division Courtroom
PETITION FOR APPOINTMENT OF GUARDIAN FOR MINOR	

1. No court proceeding is pending in this state or elsewhere concerning the respondent.
 Or
 The following proceeding(s) concern(s) the respondent. Identify name of court, case number, state, date, and type of proceeding if any.

Name of Court	Case Number	State	Date of Proceeding	Type of Proceeding

2. Regarding the Indian Child Welfare Act (ICWA):
 I am aware of the child or child's relatives having American Indian/Native American or Alaska Native heritage.
 Name of tribe(s) _____

NOTE: If you checked that you are aware of the child or child's relatives having any American Indian/Native American or Alaska Native heritage, you must complete and file with the court, JDF 1350 – Indian Child Welfare Act (ICWA) Assessment Form.

I am not aware of the child or child's relatives having any American Indian/Native American or Alaska Native heritage.

NOTE: If you checked that you are not aware of the child or child's relatives having any American Indian/Native American or Alaska Native heritage, you must complete and file JDF 1351 – American Indian/Alaska Native Indian Child Welfare Act (ICWA) Declaration of Non-Indian Heritage.

3. **The petitioner is:**
 a person interested in the welfare of the minor.
 or
 the minor and is 12 years of age or older.

This is a petition for appointment of a(n):

Guardian. (NOTE: The appointment will expire on the minor's 18th birthday, unless otherwise ordered by the court.)

Guardian with a request for findings establishing the Minor's eligibility for classification as a special immigrant juvenile under federal law pursuant to § 15-14-204(2.5)(b), C.R.S. (NOTE: The appointment will expire on the minor's 21st birthday, unless otherwise ordered by the court.)

Temporary Guardian (not to exceed 6 months). (§ 15-14-204(4), C.R.S.)

Emergency Guardian (not to exceed 60 days). (§ 15-14-204(5), C.R.S.)

4. Information about the petitioner:

Name: _____ List all names used (also known as, formerly known as, etc.): _____

Relationship to minor: _____

Street Address: _____

City: _____ State: _____ Zip Code: _____

Mailing Address, if different: _____

City: _____ State: _____ Zip Code: _____

Primary Phone: _____ Alternate Phone: _____

Email Address: _____

Does Petitioner need an interpreter? No Yes (Language: _____)

5. Information about the minor:

Name: _____ Current age: _____ Date of Birth: _____

Street Address: _____

City: _____ State: _____ Zip Code: _____

Mailing Address, if different: _____

City: _____ State: _____ Zip Code: _____

Primary Phone: _____ Alternate Phone: _____

Email Address: _____

Does the minor need an interpreter? No Yes (Language: _____)

6. Information about the parents:

Parent's Name: _____ Deceased Unknown (attach Birth Certificate)

Street Address: _____

City: _____ State: _____ Zip Code: _____

Mailing Address, if different: _____

City: _____ State: _____ Zip Code: _____

Primary Phone: _____ Alternate Phone: _____

Email Address: _____

Does this person need an interpreter? No Yes (Language: _____)

Parent's Name: _____ Deceased Unknown (attach Birth Certificate)

Street Address: _____

City: _____ State: _____ Zip Code: _____

Mailing Address, if different: _____

City: _____ State: _____ Zip Code: _____

Primary Phone: _____ Alternate Phone: _____

Email Address: _____

Does this person need an interpreter? No Yes (Language: _____)

7. The parent or guardian has nominated has not nominated a guardian by will or other writing. (Attach copy of document, if applicable.)

8. Venue for this proceeding is proper in this county because the minor:
 resides in this county.
 is present in this county at the time the proceeding is commenced.

9. The best interest of the minor will be served by the appointment of a guardian.

10. The minor is unmarried and:

the parent(s) consent(s) to the appointment of a guardian. (Attach Consent of Parent - JDF 825).

all parental rights have been terminated by

prior court order. (Attach a copy of the court order to this petition.)

death. (If available, attach a copy of the death certificate to this petition.)

parents are unwilling or unable to exercise their parental rights. (Briefly explain.)

guardianship has previously been granted to a third party who has died or become incapacitated and the guardian has not appointed a successor guardian by will or written instrument.
(Describe and attach order or any relevant documents.)

11. Petitioner is 21 years of age or older, nominates himself or herself and requests to be appointed as guardian.
or
 Petitioner nominates the following person, who is 21 years of age or older, to be appointed as guardian. (§15-14-206, C.R.S.)

Name: _____ List all names used (also known as, formerly known as, etc.): _____

Relationship to Minor: _____

Street Address: _____

City: _____ State: _____ Zip Code: _____

Mailing Address, if different: _____

City: _____ State: _____ Zip Code: _____

Primary phone: _____ Alternate phone: _____

Email Address: _____

Does this person need an interpreter? No Yes (Language: _____)

12. The minor, who is 12 years of age or older, has nominated a guardian. (Attach Consent or Nomination of Minor - JDF 826).

13. It is necessary to appoint a temporary guardian (may not exceed six months) for the minor until a hearing can be held on this petition because an immediate need exists, and the appointment of a temporary guardian is in the best interest of the minor. (§15-14-204(4), C.R.S.)

(Describe the immediate need.) _____

14. It is necessary to appoint an **emergency guardian** (may not exceed 60 days) for the minor, because of the likelihood of substantial harm to the minor's health or safety, an emergency exists, and no other person appears to have authority to act in the circumstances. (§ 15-14-204(5) C.R.S.)

(Describe the nature of the emergency.) _____

15. The following person had the primary care and custody of the minor during the 60 days prior to the filing of this petition:

Name: _____ Relationship to Minor: _____

Street Address: _____

City: _____ State: _____ Zip Code: _____

Mailing Address, if different: _____

City: _____ State: _____ Zip Code: _____

Primary Phone: _____ Alternate Phone: _____

Email Address: _____

Dates of Care: _____

Does this person need an interpreter? No Yes (Language: _____)

16. The parents are both deceased. The following person is the adult relative nearest in kinship that can be found:

Name: _____ Relationship to Minor: _____

Street Address: _____

City: _____ State: _____ Zip Code: _____

Mailing Address, if different: _____

City: _____ State: _____ Zip Code: _____

Primary phone: _____ Alternate phone: _____

Email Address: _____

Does Petitioner need an interpreter? No Yes (Language: _____)

17. The following person is currently acting as guardian or conservator for the minor in Colorado or elsewhere:

Name: _____ Relationship to Minor: _____

Street Address: _____

City: _____ State: _____ Zip Code: _____

Mailing address, if different: _____

City: _____ State: _____ Zip Code: _____

Primary Phone: _____ Alternate Phone: _____

Email Address: _____

Does Petitioner need an interpreter? No Yes (Language: _____)

18. The guardian may receive compensation.

The hourly rates to be charged, any amounts to be charged pursuant to a published fee schedule, including the rates and basis for charging fees for any extraordinary services, and any other bases upon which a fee charged to the estate will be calculated, are as stated below or in an attachment to this petition. *

The basis of compensation has not yet been determined.

* There is a continuing obligation to disclose any material changes to the basis for charging fees. (§ 15-10-602, C.R.S.)

19. Counsel for the guardian may be compensated.

The hourly rates to be charged, any amounts to be charged pursuant to a published fee schedule, including the rates and basis for charging fees for any extraordinary services, and any other bases upon which a fee charged to the estate will be calculated, are as stated below or in an attachment to this petition. *

The basis of compensation has not yet been determined.

* There is a continuing obligation to disclose any material changes to the basis for charging fees. (§ 15-10-602, C.R.S.)

20. The minor's assets are:

Description of Assets (e.g. bank accounts, property) <input type="checkbox"/> None	Estimated Value
	\$
	\$
Total	\$

21. The minor's income is:

Description of Income (e.g. social security, insurance) <input type="checkbox"/> None	Estimated Amount of Income
	\$
	\$
Total	\$

22. The petitioner requests that an appointment of a guardian be made after notice and hearing.

In addition, petitioner requests the following:

- By checking this box, I am acknowledging I am filling in the blanks and not changing anything else on the form.
 By checking this box, I am acknowledging that I have made a change to the original content of this form.

VERIFICATION

I declare under penalty of perjury under the law of Colorado that the foregoing is true and correct.

Executed on the _____ day of
(date)

Executed on the _____ day of
(date)

_____, _____,
(month) (year)

_____, _____,
(month) (year)

at _____
(city or other location, and state OR country)

at _____
(city or other location, and state OR country)

(printed name)

(printed name)

(Signature of Petitioner)

(Signature of Co-Petitioner, if any)

Attorney Signature, (if any)

Date

<input type="checkbox"/> District Court <input type="checkbox"/> Denver Probate Court _____ County, Colorado Court Address: <hr/> In the Interest of: Minor	▲ COURT USE ONLY ▲
Attorney or Party Without Attorney (Name and Address): Phone Number: E-mail: FAX Number: Atty. Reg. #:	Case Number: Division Courtroom
CONSENT OF PARENT	

I, _____ (parent), of the above-named minor.

1. Regarding the Indian Child Welfare Act (ICWA):

I am aware of the child or child's relatives having American Indian/Native American or Alaska Native heritage.

Name of tribe(s) _____

NOTE: If you checked that you are aware of the child or child's relatives having any American Indian/Native American or Alaska Native heritage, you must complete and file with the court, JDF 1350 – Indian Child Welfare Act (ICWA) Assessment Form.

I am not aware of the child or child's relatives having any American Indian/Native American or Alaska Native heritage.

NOTE: If you checked that you are not aware of the child or child's relatives having any American Indian/Native American or Alaska Native heritage, you must complete and file JDF 1351 – American Indian/Alaska Native Indian Child Welfare Act (ICWA) Declaration of Non-Indian Heritage.

2. I consent to the appointment of _____ (name) as guardian.

3. I consent to a guardianship with the following restrictions:

By checking this box, I am acknowledging I am filling in the blanks and not changing anything else on the form.

By checking this box, I am acknowledging that I have made a change to the original content of this form.

VERIFICATION

I declare under penalty of perjury under the law of Colorado that the foregoing is true and correct.

Executed on the _____ day of _____, _____,
(date) (month) (year)

at _____
(city or other location, and state OR country)

(printed name)

(signature)

<input type="checkbox"/> District Court <input type="checkbox"/> Denver Probate Court _____ County, Colorado Court Address: _____ <hr/> In the Interest of: <hr/> Minor	▲ COURT USE ONLY ▲ <hr/> Case Number: _____ Division Courtroom
ORDER APPOINTING GUARDIAN FOR MINOR	

Upon consideration of the Petition for Appointment of Guardian for the above minor and hearing on _____
 _____ (date),

The court has considered any expressed wishes of the minor concerning the selection of the guardian. The court has considered the powers and duties of the guardian, the scope of the guardianship, and the priority and qualifications of the nominee.

The court finds, determines and orders:

1. Venue is proper and required notices have been given or waived.
2. The minor was born on _____ (date).
3. An interested person seeks appointment of a guardian.
4. The minor's best interest will be served by the appointment of a guardian.
5. The minor's parents' consent to the appointment of a guardian.
 The minor's parents' parental rights have been terminated by prior court order.
 The minor's parents are deceased.
 The minor's parents are unwilling or unable to exercise their parental rights.
 Guardianship has previously been granted to a third party who has died or become incapacitated and the guardian has not appointed a successor guardian by will or written instrument.
6. The court finds it has no reason to know that the minor is an Indian Child as defined by the Indian Child Welfare Act under 25 U.S.C. § 1901 et seq.

OR

A separate Order regarding the court's findings pursuant to the Indian Child Welfare Act under 25 U.S.C. § 1901 et seq. was issued.

7. The court appoints the following person as guardian for the minor:

Name: _____
 Street address: _____
 City: _____ State: _____ Zip Code: _____
 Mailing Address, if different: _____
 City: _____ State: _____ Zip Code: _____

Primary Phone: _____ Alternate Phone: _____
 Email Address: _____

8. The guardian must promptly notify the court if the guardian's street address, email address, or phone number changes and of any change of address for the minor.
9. The guardian may not establish or move the minor's custodial dwelling outside the State of Colorado without a court order.
10. Within 30 days of appointment, the guardian must provide a copy of this Order Appointing Guardian for Minor to the minor if 12 years or older and persons given notice of the petition and must advise those persons using Notice of Appointment of Guardian and/or Conservator (JDF 812) that they have the right to request termination or modification of the guardianship.
11. The guardian must file the annual Guardian's Report - Minor (JDF 834) with the court each year by the minor's birthday or by _____ (date).
12. Copies of all future court filings must be provided to the following interested persons:

Name	Relationship to Minor
	The minor if 12 years or older at the time of mailing
	Parent or adult nearest in kinship
	Parent or adult nearest in kinship
	Guardian

13. The guardian is authorized to access the minor's medical records and information. The guardian is deemed to be the minor's personal representative for all purposes relating to the minor's protected health information, as provided in HIPAA, Section 45 CFR 164.502(g)(2).
14. Letters of Guardianship will be issued. The Letters will expire on the minor's 18th birthday, _____ (date), unless otherwise ordered by the court.

- The powers and duties of the guardian are unrestricted.
 The powers and duties of the guardian are limited by the following restrictions:

OR

The appointment is pursuant to § 15-14-204(2.5)(b), C.R.S. Letters of Guardianship will be issued. The Letters will expire on the minor's 21st birthday, _____ (date), unless otherwise ordered by the court.

- The powers and duties of the guardian are unrestricted.
 The powers and duties of the guardian are limited by the following restrictions:

A separate Order regarding the court's findings establishing the minor's eligibility for classification as a special immigrant juvenile was issued.

15. Per § 15-14-208(1), C.R.S. the guardian has the powers of a parent regarding the ward's support, care, education, health and welfare. The guardian shall maintain physical custody of the minor and shall determine the minor's place of residence and all visitation absent specific orders from the Court.

16. The court further orders:

Date: _____

 Judge Magistrate

<input type="checkbox"/> District Court <input type="checkbox"/> Denver Probate Court _____ County, Colorado Court Address: _____ In the Interests of: _____ Minor	▲ COURT USE ONLY ▲ Case Number: Division Courtroom
ORDER APPOINTING TEMPORARY GUARDIAN FOR MINOR PURSUANT TO § 15-14-204(4), C.R.S.	

Upon consideration of the Petition for Appointment of Temporary Guardian for the above minor and/or hearing on _____ (date),

The court finds, determines and orders:

1. Venue is proper and required notices have been given or waived.
2. The minor was born on _____ (date).
3. A qualified person seeks appointment.
4. An immediate need exists for the appointment of a temporary guardian and the appointment would be in the best interest of the minor.
5. The temporary guardianship cannot exceed six months from appointment.
6. The court finds it has no reason to know that the minor is an Indian Child as defined by the Indian Child Welfare Act under 25 U.S.C. § 1901 et seq.

OR

A separate Order regarding the court's findings pursuant to the Indian Child Welfare Act under 25 U.S.C. § 1901 et seq. was issued.

7. The court appoints the following person as temporary guardian for the minor:

Name: _____
 Street address: _____
 City: _____ State: ____ Zip Code: _____
 Mailing address, if different: _____
 City: _____ State: _____ Zip Code: _____
 Primary phone: _____ Alternate phone: _____
 Email address: _____

8. The guardian must promptly notify the court if the guardian's street address, email address, or phone number changes and of any change of address for the minor.

9. The guardian may not establish or move the minor's custodial dwelling outside the state of Colorado without a court order.
10. Copies of all future court filings must be provided to the following interested persons:

Name	Relationship to Minor
	Minor if 12 years or older at time of mailing
	Parent or adult nearest in kinship
	Parent or adult nearest in kinship

11. The guardian must provide a copy of this Order Appointing Temporary Guardian for Minor to the minor (if 12 years of age or older) and interested persons within 5 days after the appointment pursuant to § 15-14-204(4), C.R.S.
12. The temporary guardian is authorized to access the minor's medical records and information. The temporary guardian is deemed to be the minor's personal representative for all purposes relating to the minor's protected health information, as provided in HIPAA, Section 45 CFR 164.502(g)(2).
13. Letters of temporary guardianship will be issued. This temporary guardianship expires on _____ (date not to exceed 6 months from appointment.)

- The powers and duties of the temporary guardian are unrestricted.
- The powers and duties of the temporary guardian are limited by the following restrictions:

14. The court further orders:

Date: _____

_____ Judge Magistrate

<input type="checkbox"/> District Court <input type="checkbox"/> Denver Probate Court _____ County, Colorado Court Address: _____ In the Interest of: Minor		▲ COURT USE ONLY ▲
Attorney or Party Without Attorney (Name and Address): _____ Phone Number: _____ E-mail: _____ FAX Number: _____ Atty. Reg. #: _____		Case Number: _____ Division Courtroom
GUARDIAN'S REPORT – MINOR		

Current Reporting Period From _____ To _____
(MM/DD/YYYY) (MM/DD/YYYY)
(REPORTING DATES MUST BE FOR THE PAST YEAR AND MAY NOT REPORT INTO THE FUTURE.)

Instructions to guardian:

You have been ordered to complete a Guardian's Report every year on behalf of the minor. When answering the questions in this report, you are required to provide details. Answers such as "same as last year" or "no change since last report" are not acceptable answers. Your report may be rejected with those answers.

COLORADO LAW REQUIRES THAT ANY GUARDIAN WANTING TO REMOVE THE MINOR CHILD FROM THE STATE OF COLORADO MUST OBTAIN COURT PERMISSION. You must file the necessary forms to make this request and obtain court permission.

CONTACT INFORMATION

Minor's Information:

Check if Updated Information from last Report

Name: _____ **Age:** _____

Street Address: _____

(Include Name of Living Center or Nursing Home)

City: _____ State: _____ Zip Code: _____

Mailing Address, if different: _____

City: _____ State: _____ Zip Code: _____

Primary Phone : _____ Alternate Phone: _____

Guardian's Information:

Check if Updated Information from last Report

Name: _____ **Age:** _____

Occupation: _____ Your Relationship to Minor: _____

Street Address: _____

City: _____ State: _____ Zip Code: _____

Mailing Address, if different: _____

City: _____ State: _____ Zip Code: _____ E-Mail Address: _____

Primary Phone: _____ Alternate Phone: _____

Have you had any criminal charges filed against you or convictions entered since the last report? Yes No

If Yes, explain: _____

Co-Guardian's Information: (if applicable) **Check if Updated Information from last Report**

Name: _____ **Age:** _____

Occupation: _____ Your Relationship to Minor: _____

Street Address: _____

City: _____ State: _____ Zip Code: _____

Mailing Address, if different: _____

City: _____ State: _____ Zip Code: _____

E-Mail Address: _____

Primary Phone: _____ Alternate Phone: _____

Have you had any criminal charges filed against you or convictions entered since the last report? Yes No

If Yes, explain: _____

I. STATUS INFORMATION **Yes** **No**

A. Do you recommend that the guardianship continue?
If **No**, explain: _____

B. Do you recommend any changes to the guardianship?
If **Yes**, explain: _____

C. Do you wish to remain guardian?
If **No**, explain: _____

Note: If you wish to terminate this guardianship or modify by replacing the current guardian or adding a co-guardian, you must file a separate petition with the court.

D. The minor's care and living situation is: Very Good Good Adequate Poor

E. Do you believe the current plan for care is in the minor's best interest? Yes No
If **No**, describe your recommended changes:

F. Who currently provides the majority of the minor's supervision or care and treatment on a daily basis?

Name _____

Primary Phone: _____

Alternate Phone: _____

G. Has the minor's residence changed since the last report? Yes No

If **Yes**, identify the date of the move, address of residence, type of residence and reason for the change.

Date of Move	Address of Residence	Type of Residence	Reason for Change

II. PERSONAL CARE AND OTHER ISSUES

A. Date of the minor's last medical exam: _____ Dental exam: _____

B. Are the Minor's immunizations current? Yes No

If **No**, explain: _____

C. Is the minor covered under health or dental insurance? Yes No

If **Yes**, describe coverage. If **No**, explain efforts to obtain coverage.

D. Describe any counseling services provided to the minor. If none were provided, state "none".

E. Describe any other services provided to the minor. If none were provided, state "none".

F. Describe any medical services provided to the minor. If none were provided, state "none".

G. Identify any special needs of the minor during this reporting period. If none were identified, state "none".

H. Has the minor's physical and medical condition changed since the last report? **Yes** **No** If **Yes**, explain:

I. Identify any significant events involving the minor since the last report e.g. special awards or recognition. If none were identified, state "none".

J. Has the minor been involved in a juvenile delinquency case or any other type of court action? **Yes** **No** If **Yes**, in which County? _____

K. Does the minor have any behavioral issues? **Yes** **No**
Describe the nature of the behavioral issues and any treatment the minor is receiving to help with the issues. _____

L. If the minor child is not of school age, identify the stages of development for the minor child. This would include but is not limited to, if the child developed his or her motor skills (crawling, walking, etc.), learned to talk, and learned colors, shapes and numbers at age appropriate times. Include if the child is on track developmentally for his or her age and if not on track, explain why not and the steps taken to help the child. Does the child's doctor have any concerns?

- M. Does the minor have any contact with the parents or other family members? Yes No
Briefly describe the visits: Name of person visiting, frequency and length of visits and date of the last visit.
If no visits, briefly describe why not.

III. EDUCATION AND EXTRACURRICULAR ACTIVITIES

- A. Is the minor attending school: Yes No
If **Yes**, complete the information below: If **No**, please be sure to answer question L on page 4, Part II.

Name of School: _____ Current Grade Level: _____

Address: _____

Phone Number: _____ Minor's grades are: Excellent Average Below Average

If **below average** explain why.

- B. If the minor is old enough, does he or she have a job? Yes No Describe.

- C. Describe the educational services provided to the minor.

- D. Identify a few of the minor's goals, accomplishments, and any extracurricular activities during this reporting period.

IV. FINANCIAL MATTERS

Complete this section only if there is no conservatorship and the guardian has custody of funds.

- A. Does the minor own any property? Yes No
- B. Do you have possession or control of the minor's assets, e.g. property (real estate and personal property items), financial accounts? Yes No
 If Yes, describe the type of property and approximate value of the property: _____

- C. Do you have control of the minor's Income? Yes No
- D. If Yes, describe: _____

 _____ Do you or the minor receive any financial support from the biological parents or other family members? Yes No If there is a current child support order, provide the name of the court, case number, date of most recent order, and status of the payments.

Name of Court	Case Number	State	Date of Current Order	Amount	Payment Status e.g. on time, late

- E. If applicable, identify the representative payee for Social Security and other income benefits.
 Name: _____ Phone Number: _____
- F. Have any fees been paid to you in your role as guardian? Yes No
 If Yes, describe: _____

- G. Have any fees been paid to others for the care of the minor or his or her property? Yes No
 If Yes, describe: _____

SUMMARY OF FINANCIAL ACTIVITY DURING REPORTING PERIOD		
Beginning balance of bank accounts (savings, checking, etc.)	\$	
Plus monies received (social security, pension beneficiary, child support, interest, etc.) from any source on behalf of the person	+\$	
Less total fees to care providers	-\$	
Less total monies paid to the Minor, e.g. personal needs	-\$	
Less total fees paid to guardian	-\$	
Less any other expenses, e.g. housing, insurance, maintenance	-\$	
Ending balance of bank accounts	\$	

You are required to maintain supporting documentation for all receipts and all disbursements under your control during the duration of this appointment. The court or any interested persons as identified in the Order Appointing Guardian may request copies at any time.

- By checking this box, I am acknowledging I am filling in the blanks and not changing anything else on the form.
- By checking this box, I am acknowledging that I have made a change to the original content of this form.

VERIFICATION

I declare under penalty of perjury under the law of Colorado that the foregoing is true and correct.

Executed on the _____ day of
(date)

Executed on the _____ day of
(date)

_____, _____,
(month) (year)

_____, _____,
(month) (year)

at _____
(city or other location, and state OR country)

at _____
(city or other location, and state OR country)

(printed name)

(printed name)

(Signature of Guardian)

(Signature of Co-Guardian, if any)

Attorney Signature, (if any)

Date

**IMPORTANT
THIS SECTION MUST BE COMPLETED CORRECTLY AND SIGNED
OR THE REPORT MAY BE REJECTED.**

The Guardian's Report must be served on the **WARD AND INTERESTED PERSONS** pursuant to Order Appointing Guardian (see § 15-14-207(2)(e), C.R.S.), including minors 12 years of age or older. In the space below under the Certificate of Service, list the names, addresses, and method of delivery for each party listed on the Order Appointing Guardian and provide each party with a copy of this report.

NOTE: If you wish to change the persons entitled to receive copies of reports or other documents filed, you must file a separate motion with the court.

CERTIFICATE OF SERVICE

I certify that on _____ (date), a copy of this _____ (name of document) was served as follows on each of the following:

Name and Address	Relationship to Decedent, Ward, or Protected Person	Manner of Service*

*Insert one of the following: hand delivery, first-class mail, certified mail, e-service, or fax.

Signature

	Adult children

9. If an appointment is made without previous notice to the ward, the affected guardian or other interested persons, the temporary substitute guardian must, within 5 days after the appointment, provide copies to them.

10. The temporary substitute guardian is authorized to access the ward's medical records and information. The temporary substitute guardian is deemed to be the ward's personal representative for all purposes relating to the ward's protected health information, as provided in HIPAA, Section 45 CFR 164.502(g)(2).

11. **Letters of Guardianship will be issued.** This temporary substitute guardianship expires on _____ (date not to exceed 6 months from appointment). The temporary substitute guardian has the same powers as set forth in the previous Order Appointing Guardian, except as follows:

12. **The court further orders:**

Date: _____

_____ Judge Magistrate

City: _____ State: _____ Zip Code: _____

Mailing Address, if different: _____

City: _____ State: _____ Zip Code: _____

Primary Phone: _____ Alternate Phone: _____

Email Address: _____

Have you had any criminal charges filed against you or convictions entered since the last report? Yes No

If Yes, explain: _____

Co-Guardian's Information (if applicable): Check if updated information from last report

Name: _____ **Age:** _____

Occupation: _____ Your Relationship to Ward: _____

Street Address: _____

City: _____ State: _____ Zip Code: _____

Mailing Address, if different: _____

City: _____ State: _____ Zip Code: _____

Primary Phone: _____ Alternate Phone: _____

Email Address: _____

Have you had any criminal charges filed against you or convictions entered since the last report? Yes No

If Yes, explain: _____

I. PLACEMENT AND CARE SUPERVISION

A. Who currently supervises the ward's care and treatment on a daily basis?

Name: _____

Primary Phone: _____ Alternate Phone: _____

B. If the ward has moved since the last reporting period, identify the date of the move, address of residence, type of residence, and reason for the change.

Date of Move	Name of Facility and Address	Type of Residence	Reason for Change

II. STATUS INFORMATION

Yes No

A. Do you recommend that the guardianship continue?

If **No**, explain: _____

B. Do you recommend any changes to the guardianship?

If **Yes**, explain: _____

C. Do you wish to remain guardian?

If **No**, explain: _____

Note: If you wish to terminate this guardianship or modify by replacing the current guardian or adding a co-guardian, you must file a separate petition with the Court.

III. CURRENT CONDITION OF THE WARD

Please describe in detail the current **mental** condition of the ward.

Please describe in detail the current **physical** condition of the ward.

Please describe in detail the current **social** condition of the ward.

IV. PERSONAL CARE AND OTHER ISSUES

Yes No

A. Has the ward's physical and medical condition (illness/injuries) changed since the last report? If **Yes**, explain: _____

B. Has the ward been hospitalized since the last report?

If **Yes**, explain: _____

C. Have there been any medical, social or psychological evaluations of the ward performed? Please explain: _____

D. Is there a need for further medical, social or psychological evaluations of the ward? Please explain: _____

E. Describe the medical, educational, vocational and other services provided to the ward:

Please describe in detail any **medical** services provided to the ward. If none were provided, state "none".

Please list any **medications** provided to the ward. If none were provided, state "none".

Please describe in detail any **educational** services provided to the ward. If none were provided, state "none".

Please describe in detail any **vocational** services provided to ward. If none were provided, state "none".

Please describe in detail any **other** services provided to ward. If none were provided, state "none".

F. How often do you contact the ward's medical provider?

Daily Weekly Monthly Other: _____

How do you contact the ward's medical provider (phone, email, etc.)? _____

G. Do you believe the current plan for care, treatment and/or rehabilitation is in the ward's best interest?

Yes No If No, describe what changes would be appropriate.

H. The ward's care and living situation is Very Good Good Adequate Poor

I. Describe your plans for the ward's future care, including any recommended changes.

V. VISITATION OF WARD

Colorado law requires that a guardian maintain sufficient contact with the ward.

A. How often do you visit the ward? Daily Weekly Monthly Other: _____

B. How often do you contact the ward or the ward's care provider?

Daily Weekly Monthly Other: _____

C. When was the last time you saw the ward in person? _____ (date)

D. Indicate how long your visits are and summarize your activities with and on behalf of the ward.

E. Does the ward participate in decision-making? Yes No Briefly describe.

VI. FINANCIAL MATTERS

Complete this section only if the guardian has custody of funds.

A. Are there sufficient financial resources to take care of the ward? Yes No

If **No**, what do you believe is the best way to handle this problem? _____

B. Do you have control of the ward's income? Yes No

If **Yes**, describe: _____

C. If applicable, identify the representative payee for Social Security and other income benefits.

Name: _____ Phone Number: _____

D. Have any fees been paid to you in your role as guardian? Yes No

If **Yes**, describe: _____

E. Have any fees been paid to others for the care of the ward or his/her property? Yes No
 If Yes, describe and identify name of person: _____

Please indicate whether you have possession or control of the following:

Bank Account(s): Name of financial institution(s) and last four numbers of account(s): _____

Estimated Value: _____

Investment Account(s): Name of financial institution(s) and last four numbers of account(s): _____

Estimated Value: _____

Real Estate: Address: _____

Estimated Value: _____

Personal Property (i.e. jewelry, collectibles, vehicles...) Description: _____

Estimated Value: _____

Liabilities/Debts: Creditor(s): _____

Estimated Amount: _____

SUMMARY OF FINANCIAL ACTIVITY DURING REPORTING PERIOD		
Beginning balance of bank accounts (savings, checking, etc.)	\$	
Plus money received (Social Security, SSI, pension, disability, interest, etc.) from any source on behalf of the Ward	+ \$	
Less total fees to care providers	- \$	
Less total monies paid to the Ward, e.g. personal needs	- \$	
Less total fees paid to guardian	- \$	
Less any other expenses, e.g. housing, insurance, maintenance	- \$	
Ending balance of bank accounts	\$	

You are required to maintain supporting documentation for all receipts and all disbursements under your control during the duration of this appointment. The court or any interested persons as identified in the Order Appointing Guardian may request copies at any time.

- By checking this box, I am acknowledging I am filling in the blanks and not changing anything else on the form.
- By checking this box, I am acknowledging that I have made a change to the original content of this form.

VERIFICATION

I declare under penalty of perjury under the law of Colorado that the foregoing is true and correct.

Executed on the _____ day of
(date)

Executed on the _____ day of
(date)

_____, _____,
(month) (year)

_____, _____,
(month) (year)

at _____
(city or other location, and state OR country)

at _____
(city or other location, and state OR country)

(printed name)

(printed name)

(Signature of Guardian)

(Signature of Co-Guardian, if any)

Attorney Signature, (if any)

Date

**IMPORTANT
THIS SECTION MUST BE COMPLETED CORRECTLY AND SIGNED
OR THE REPORT MAY BE REJECTED.**

Colorado Law **REQUIRES** that the Guardian's Report be served on the **WARD AND INTERESTED PERSONS** pursuant to Order Appointing Guardian and § 15-14-309(4), C.R.S. In the space below under the Certificate of Service, list the names, addresses, and method of delivery for each party listed on the Order Appointing Guardian and provide each party with a copy of this report.

NOTE: If you wish to change the persons entitled to receive copies of reports or other documents filed, you must file a separate motion with the court.

CERTIFICATE OF SERVICE

I certify that on _____ (date), a copy of this _____ (name of document) was served as follows on each of the following:

Name and Address	Relationship to Decedent, Ward, or Protected Person	Manner of Service*

*Insert one of the following: hand delivery, first-class mail, certified mail, e-service, or fax.

Signature

<input type="checkbox"/> District Court <input type="checkbox"/> Denver Probate Court _____ County, Colorado Court Address: _____ <hr/> In the Interest of: Minor	▲ COURT USE ONLY ▲ <hr/> Case Number: _____ Division _____ Courtroom _____
ORDER APPOINTING CONSERVATOR FOR MINOR	

Upon consideration of the Petition for Appointment of Conservator for the above minor and hearing on _____ (date).

The Court finds that:

1. Venue is proper and required notices have been given or waived.
2. An interested person seeks the appointment of a conservator.
3. The person is a minor born on _____ (date).
4. The minor's best interest will be served by appointment of a conservator.
5. The appointment of a conservator is necessary because the minor:
 - Owns money or property that requires management or protection that cannot otherwise be provided.
 - Has or may have business affairs that may be put at risk or prevented because of the minor's age.
 - Needs money for support and education and that protection is necessary or desirable to obtain or provide money.
 - For reasons other than age the minor is unable to manage property and business affairs because he or she is unable to effectively receive and evaluate information or both or to make or communicate decisions, even with the use of appropriate and reasonably available technological assistance. The evidence is clear and convincing in this regard. Additionally, it has been shown that the minor has property that will be wasted or dissipated unless proper management is provided or that the minor, or persons entitled to the minor's support, require money for support, care, education, health, and welfare, and protection is necessary or desirable to obtain or provide money.
 - A conservator is required because the minor is missing, detained, or unable to return to the United States.

The court has considered any expressed wishes of the minor concerning the selection of the conservator. The court has considered the powers and duties of the conservator, the scope of the conservatorship, and the priority and qualifications of the nominee.

The court appoints the following person as conservator of the minor:

Name: _____
 Street Address: _____
 City: _____ State: _____ Zip Code: _____
 Mailing Address, if different: _____
 City: _____ State: _____ Zip Code: _____
 Primary Phone: _____ Alternate Phone: _____
 Email Address: _____

The court directs the issuance of Letters of Conservatorship as follows:

The letters will expire on _____ (date) the minor's 21st birthday, unless otherwise ordered by the court.

The powers and duties of the conservator are unrestricted. The conservator may exercise all the powers granted in §15-14-425, C.R.S.

The conservator must open an account in a federally insured financial institution for the sole benefit of the minor or protected person. The account must be opened on behalf of the minor or protected person. The account must be opened using the sample title, "_____ (Name of Conservator), for _____ (Name of Minor/Protected Person)". The conservator must deposit \$ _____ and funds received subsequently into the account. The conservator may make internal transfers of funds in order to take advantage of changes in interest rates except for internal transfers, the financial institution must permit no withdrawals from the account, except by separate certified order of this court. An Acknowledgment of Deposit of Funds to Restricted Account (JDF 867) must be returned to the court within 45 days. No attorney fees may be paid in this case until the acknowledgment form is signed and returned to the court.

The powers and duties of the conservator are limited by the following restrictions:

The court orders the following:

1. The conservator must promptly notify the court if his or her street address, email address, or phone number changes and any change of address for the Minor.
2. Within 30 days of appointment, the conservator must provide a copy of this order, if 12 years or older, and persons given notice of the petition and must advise those persons using Notice of Appointment of Guardian and/or Conservator (JDF 812) that they have the right to request termination or modification of the conservatorship.
3. The conservator must:
 - file for approval with the court a Conservator's Inventory with Financial Plan (JDF 882) on or before _____ (date within 90 days from appointment). The value of the assets must be reported as of the date of this order.
 - file a Conservator's Report (JDF 885) with the court each year on or before _____ (date). The time period covered in the report must begin on _____ (date) and end on _____ (date). The conservator is required to maintain all supporting documentation; including receipts and disbursements.

file a Restricted Account Report (JDF 896) along with a copy of the most recent bank statement for the restricted account each year on the Minor's/Protected Person's birthday _____ (date) or on _____ (date).

4. The conservator will:

serve without bond for the following reason(s): _____

serve with bond in the amount of \$ _____. The bond must be posted with the Court by _____ (date). If bond is posted by a surety, notice of any proceeding must be provided to the surety.

5. Copies of all future Court filings must be provided to the following:

Name of Interested Person	Relationship to Minor
	The Minor if 12 years or older at the time of mailing
	Parent or adult nearest in kinship
	Parent or adult nearest in kinship
	Conservator

6. The court further orders:

Date: _____

 Judge Magistrate

Copies of all future court filings will be provided to the following interested persons:

Name	Relationship to minor/protected person
	Minor/protected person when 12 years or older
	Parent or adult nearest in kinship
	Other:

Dated: _____

 Judge Magistrate

The court further orders:

Copies of all future court filings will be provided to the following interested persons:

Name	Relationship to minor/protected person
	Minor/protected person when 12 years or older
	Parent or adult nearest in kinship
	Other:

Dated: _____

 Judge Magistrate

<input type="checkbox"/> District Court <input type="checkbox"/> Denver Probate Court _____ County, Colorado Court Address: <hr/> In the Interest of: <hr/> Protected Person	▲ COURT USE ONLY ▲
	Case Number: _____ Division: _____ Courtroom: _____
ORDER APPOINTING SPECIAL CONSERVATOR <input type="checkbox"/> ADULT <input type="checkbox"/> MINOR	

Upon consideration of the Petition for Appointment of Conservator for the above person and hearing on _____ (date),

The court finds that:

1. Venue is proper and required notices have been given or waived.
2. An interested person seeks the appointment of a special conservator.
3. The protected person's best interest will be served by the appointment of a special conservator.

The court finds by clear and convincing evidence that:

For the following reasons, it is necessary to appoint a special conservator to preserve and apply the protected person's property as may be required for the support of the protected person or individuals who are in fact dependent upon the protected person, until a hearing can be held on the Petition for Appointment of Conservator:

It is necessary to appoint a special conservator to assist in the accomplishment of the following protective arrangement or other authorized single transaction. (§ 15-14-412(3), C.R.S.)

The court has appointed a professional without priority to serve pursuant to § 15-14-413(1), C.R.S. or a public administrator pursuant to § 15-12-622, C.R.S., without notice to the respondent, respondent's lawyer, or any other person entitled to notice. Accordingly, the court will simultaneously appoint a court visitor to investigate the appointment of the special conservator and file a report within 14 days after the appointment in accordance with § 15-14-412(3)(b), C.R.S. and § 15-14-113.5, C.R.S.

The court appoints the following person as special conservator:

Name: _____
 Street Address: _____
 City: _____ State: _____ Zip Code: _____
 Mailing Address, if different: _____

City: _____ State: _____ Zip Code: _____

Primary Phone: _____ Alternate Phone: _____

Email Address: _____

The court directs the issuance of Letters of Conservatorship as follows:

The letters will expire on _____ (date), unless otherwise ordered by the court.

The special conservator is granted only the following authority:

The court orders the following:

1. The special conservator must promptly notify the court if his or her street address, email address, or phone number changes and/or of any change of address for the protected person.
2. Within 30 days of appointment, the special conservator must provide a copy of this Order Appointing Special Conservator to the Protected Person, if 12 years of age or older, and persons given notice of the petition and must advise those persons using Notice of Appointment of Guardian and/or Conservator (JDF 812) that they have the right to request termination or modification of the special conservatorship.
3. This appointment is for single transactions and protective arrangements. The special conservator must report to the court by _____ (date). The report must include the following information:

4. The special conservator will:
 serve without bond for the following reason(s). _____

 serve with bond in the amount of \$ _____. The bond must be posted with the court by _____ (date). If bond is posted by a surety, notice of any proceeding must be provided to the surety.

5. Copies of all future court filings must be provided to the following:

Name of Interested Person	Relationship to Adult/Minor
	Adult/Minor
	Spouse or partner in a civil union
	Adult Children
	Parents
	Special Conservator
	Agent under power of attorney

6. The court further orders:

Date: _____

 Judge Magistrate

<input type="checkbox"/> District Court <input type="checkbox"/> Denver Probate Court _____ County, Colorado Court Address: <hr/> In the Interest of: <hr/> Protected Person	▲ COURT USE ONLY ▲ <hr/> Case Number: Division Courtroom
ORDER APPOINTING CONSERVATOR FOR ADULT	

Upon consideration of the Petition for Appointment of Conservator for the above person and hearing on _____
 _____ (date),

The court has considered any expressed wishes of the respondent concerning the selection of the conservator. The court has considered the powers and duties of the conservator, the scope of the conservatorship, and the priority and qualifications of the nominee.

The court finds that:

1. Venue is proper and required notices have been given or waived.
2. An interested person seeks the appointment of a conservator.
3. The protected person's best interest will be served by appointment of a conservator.

The court finds by clear and convincing evidence that a basis exists for a conservatorship because:

The respondent is unable to manage property and business affairs because of an inability to effectively receive or evaluate information or both or to make or communicate decisions, even with the use of appropriate and reasonably available technological assistance.

or

The respondent is missing, detained, or unable to return to the United States;

The court further finds by a preponderance of evidence that:

The respondent has property that will be wasted or dissipated unless proper management is provided.

and/or

The respondent, or persons entitled to the protected person's support, require money for support, care, education, health, and welfare; and protection is necessary or desirable to obtain or provide money.

The court appoints the following person as conservator of the protected person:

Name: _____

Street address: _____

City: _____ State: _____ Zip Code: _____

Mailing address, if different: _____

City: _____ State: _____ Zip Code: _____

Primary Phone: _____ Alternate Phone: _____

Email address: _____

The court directs the issuance of Letters of Conservatorship as follows:

The conservator may exercise all the powers granted in. § 15-14-425, C.R.S., subject to the exclusions in § 15-14-411, C.R.S. The powers and duties of the conservator are otherwise unrestricted.

The powers and duties of the conservator are limited by the following restrictions, if any:

The conservator must not, without prior court order, convey or encumber any real estate owned by the protected person.

To ensure notice of this prohibition, the conservator must record the letters evidencing appointment with the Clerk & Recorder of the County in which such real estate is located. The conservator must provide proof of the recording to the court.

The court orders the following:

1. The conservator must promptly notify the court if his or her street address, email address, or phone number changes and/or of any change of address for the protected person.
2. Within 30 days of appointment, the conservator must provide a copy of this Order Appointing Conservator for Adult to the protected person and persons given notice of the Petition and must advise those persons using Notice of Appointment of Guardian and/or Conservator (JDF 812) that they have the right to request termination or modification of the conservatorship.
3. The conservator must file for approval with the court a Conservator's Financial Plan with Inventory (JDF 882) on or before _____ (date within 90 days from appointment). The value of the assets must be reported as of the date of this order.
4. The conservator must file a Conservator's Report (JDF 885) with the court each year on or before _____ (date). The time period covered in the report will begin on _____ (date) and end on _____ (date). The conservator is required to maintain all supporting documentation, including receipts and disbursements.
5. All financial powers of attorney, whether executed prior to or following the entry of this order, are terminated, except as follows:

6. The conservator will:

serve without bond for the following reason(s): _____

serve with bond in the amount of \$ _____. The bond must be posted with the court by _____ (date). If bond is posted by a surety, notice of any proceeding must be provided to the surety.

7. Copies of all future court filings must be provided to the following:

Name of Interested Person	Relationship to the Protected Person
	The protected person
	Spouse or partner in a civil union
	Adult Children
	Parents
	Conservator

8. If the protected person is an “at-risk elder” or “at-risk adult with an intellectual and developmental disability” and if conservator has reasonable cause to believe that the protected person has been abused or exploited or is at imminent risk of abuse or exploitation, conservator is required to make a report to law enforcement within 24 hours after the observation or discovery pursuant to C.R.S. § 18-6.5-108(1)(b)(XII).

9. The court further orders:

Date: _____

 Judge Magistrate

<input type="checkbox"/> District Court <input type="checkbox"/> Denver Probate Court _____ County, Colorado Court Address:		▲ COURT USE ONLY ▲
In the Interest of: Protected Person		
Attorney or Party Without Attorney (Name and Address):		Case Number:
Phone Number:	E-mail:	Division Courtroom
FAX Number:	Atty. Reg. #:	
CONSERVATOR'S FINANCIAL PLAN WITH INVENTORY AND MOTION FOR APPROVAL		

INITIAL REPORT
INVENTORY VALUES AS OF DATE OF APPOINTMENT

AMENDED REPORT
INVENTORY VALUES AS OF DATE _____ (MM/DD/YYYY)

DATE OF APPOINTMENT _____ (MM/DD/YYYY)

FILING DUE DATE _____ (MM/DD/YYYY)

I, _____ (conservator), move this court to approve this Initial Amended Conservator's Financial Plan with Inventory.

As grounds therefore, the conservator states the following:

1. The information contained in the Financial Plan with Inventory is true and complete. The proposed plan is necessary to protect and manage the income and assets of the protected person.
2. The Financial Plan is based on the actual needs and best interest of the protected person.

I understand that I am required to maintain supporting documentation for all receipts and disbursements including detailed billing statements from any professional. The court or any interested person as identified in the Order Appointing Conservator may request copies at any time.

I understand that I must provide copies of this Financial Plan with Inventory to the protected person and any others as identified in the Order Appointing Conservator, within 10 days of filing with the court and will indicate having done so by completing the certificate of service at the end of this form. (§ 15-14-404(4), C.R.S.)

Unless the court receives a timely objection to this motion, this matter will be considered unopposed and reviewed by the court.

Notice to interested persons. Interested persons have the responsibility to protect their own rights and interests within the time and in the manner provided by the Probate Code, including the appropriateness of disbursements, the compensation of fiduciaries, attorneys, and others, and the distribution of estate assets. Interested persons may file an objection with the court. The court may not review or adjudicate these or other matters unless specifically requested to do so by an interested person.

PART A: CONTACT INFORMATION

Protected Person's Information:

Check if updated information from petition

Name: _____ **Age :** _____

(Include Name of Living Center or Nursing Home, if applicable)

Street Address: _____

City: _____ State: _____ Zip Code: _____

Mailing Address, if different: _____

City: _____ State: _____ Zip Code: _____

Primary Phone: _____ Alternate Phone: _____

Conservator's Information:

Check if updated information from petition

Name: _____ **Age:** _____

Have you had any criminal charges filed against you or convictions entered since the last report? Yes No

If Yes, explain: _____

Occupation: _____ Your relationship to protected person: _____

Street Address: _____

City: _____ State: _____ Zip Code: _____

Mailing Address, if different: _____

City: _____ State: _____ Zip Code: _____

Primary Phone _____ Alternate Phone: _____

Email address: _____

Co-Conservator's Information: (if applicable)

Check if updated information from petition

Name: _____ **Age:** _____

Have you had any criminal charges filed against you or convictions entered since the last Petition? Yes No

If Yes, explain: _____

Occupation: _____ Your relationship to protected person: _____

Street Address: _____

City: _____ State: _____ Zip Code: _____

Mailing Address, if different: _____

City: _____ State: _____ Zip Code: _____

Primary Phone _____ Alternate Phone: _____

Email address: _____

PART B: CONSERVATORSHIP ISSUES

- Are the assets in the estate identified to date sufficient to provide for the present and future care of the Protected Person? Yes No If No, describe why and what steps should be taken. If you would like the Court to take action, you *must* file a motion with the Court.

2. Should there be a change in scope of the Conservatorship? Yes No If Yes, describe why and what steps should be taken. If you would like the Court to take action, you *must* file a motion with the Court.
-
-

3. Bond has been set in the amount of \$ _____. Surety has been posted.
 Bond has been waived by the Court.
 The setting of bond was deferred pending filing of this Conservator's Financial Plan with Inventory and Motion for Approval.
 The Conservator requests the bond be set in the amount of \$ _____.
OR
 The Conservator requests the bond be waived for the following reasons:
-

INSTRUCTIONS ON HOW TO COMPLETE THIS FORM

The Financial Plan and Inventory must be filed with the Court pursuant to §§15-14-418 and 15-14-419, C.R.S.

Steps 1 and 2 are a projection of the Protected Person's annual income and expenses. Enter both the anticipated monthly and annual amounts in the respective columns.

Step 3 is an inventory of the Protected Person's assets. Provide a detailed description of the asset as well as the current fair market value.

Step 4 summarizes all costs and expenses incurred by the estate related to this proceeding.

Step 5 summarizes all debts of the estate. Provide a detailed description as well as the remaining amount due.

Step 6 and 7 are a summary. Transfer the respective income and expense totals from Steps 1 and 2 as well as the asset and liability totals in steps 3 through 5 to the appropriate lines in Step 7 to calculate the net income and net worth.

PART C: FINANCIAL PLAN

List all expected sources of receipts/income and disbursements/expenses in the charts below. If a specific category is not applicable, indicate "0" in the projected monthly and annual amounts columns. You will use these amounts when you file the initial Conservator's Report.

Step 1: Projected Receipts/Income

Indicate the amount of cash receipts/income received on both a monthly and annual basis. If an income amount (such as wages) is to be received on a monthly basis, multiply the amount by 12 to determine the projected annual amount. If an income amount (such as dividends) is to be received on an annual basis, divide the amount by 12 to determine the projected monthly amount.

Description of Receipt/Income Category	Projected Monthly Amount	Projected Annual Amount
Asset Not Previously Reported		
Business Income		
Court Order Repayment		
Disability/Unemployment/Worker's Compensation		
Distribution – Annuity		
Distribution – Pensions/Retirement Plan		
Distribution - Trust		

Farm/Ranch Income		
Gifts from Others		
Inheritance		
Insurance Settlement/Benefit		
Interest/Dividends		
Loan Repayment		
Oil/Gas/Mineral Royalties		
Other Public Assistance		
Other Receipts/Income		
Proceeds from Sale of Assets		
Rental Income		
Reverse Mortgage Payment		
Social Security		
Tax Refunds		
VA Benefits		
Wages		
Total Receipts/Income Enter the total projected monthly and annual amounts in Step 6.		

Step 2: Projected Disbursements/Expenses

Indicate the cash disbursement/expense amount on both a monthly and annual basis. If an expense (such as utilities) is to be paid on a monthly basis, multiply the amount by 12 to determine the projected annual amount. If an expense (such as property taxes) is to be paid on an annual basis, divide the amount by 12 to determine the projected monthly amount.

Description of Disbursement/Expense Category	Projected Monthly Amount	Projected Annual Amount
Assisted Living/Care Facility		
Bank/Investment Account Fees		
Business Expenses (Not Farm or Ranch)		
Caregiver/In-Home Provider		
Charitable Contributions		
Clothing		
Collectibles		
Debt Repayment (excluding CC)		
Debt Repayment (Credit Card)		
Distributions-Protected Person		
Education/Tuition/Student Loan		

Entertainment/Movies		
Equipment		
Farm/Ranch Expense		
Fees–Accountant/CPA		
Fees-Conservator–Non Prof		
Fees–Conservator–Professional		
Fees–Court Visitor		
Fees-Guardian–Non Prof		
Fees-Guardian–Professional		
Fees-Guardian Ad Litem (GAL)		
Fees-Investment Acct Management		
Fees-Legal for Conservator		
Fees-Legal for Guardian		
Fees–Legal for GAL		
Fees–Legal for Protected Person		
Fees–Other Professional		
Funeral		
Gifts		
Groceries/Hygiene/Household Supplies		
HOA Fees		
Hobbies		
Home Furnishings		
Insurance – Home/Renter		
Insurance – Life		
Insurance – Long Term Care		
Insurance – Other		
Jewelry		
Livestock		
Loan Interest		
Loans		
Medical-Doctor/Prof/Hospital		
Medical- Furnishings/Supplies		
Medical-Insurance		
Medical-Medicab/Transportation		
Medical-Medications		
Medical-Other		
Mortgage		
Motor Vehicle - Insurance		
Motor Vehicle – Loan Payments		

Motor Vehicle – Registration/Other		
Motor Vehicle – Repairs/Maint/Fuel		
Moving Expenses		
Other Disbursement/Expense		
Other Transportation		
Pet Care		
Property Repairs/Maintenance		
Rent		
Restaurants/Dining Out		
School Supplies		
Services - Cleaning		
Services - Personal Care		
Subscriptions/Dues		
Taxes – FICA and Medicare		
Taxes – Income		
Taxes – Property and Assessments		
Travel/Vacations		
Utilities (Including Phone/Cell)		
Total Disbursements/Expenses Enter the total projected monthly and annual amounts in Step 6.	\$	\$

INVENTORY

Step 3: Current Assets

Report the fair market value of each category of asset in the chart below as of date of appointment. By indicating “None”, you are stating affirmatively that the Protected Person does not have assets in that category.

Note: If additional space is needed, separate sheets may be used. If additional items are discovered after the initial inventory has been completed, a supplemental inventory listing those additional item(s) must be completed.

Cash on Hand, Bank, Checking, Savings, Certificate of Deposits, and Health Accounts (Name of Bank or Financial Institution)	Payable on Death	Type of Account	Account # (last 4-digits only)	Balance
<input type="checkbox"/> None				\$
Total				\$

Stocks, Bonds, Mutual Funds, Securities, Annuities and Investment Accounts (Name of Joint Owner or Transfer on Death Beneficiary)	Number of Shares or Identify Account Number (last 4-digits only)	Current Value
<input type="checkbox"/> None		
		\$
Total		\$

Life Insurance (Name of Company/Beneficiary)	Type of Policy	Face Amount of Policy	Cash Value
<input type="checkbox"/> None			
			\$
Total			\$

Pension, Profit Sharing and Retirement Funds (Name of Beneficiary)	Type of Plan (401(k), IRA, 457, PERA, Military, etc.)	Account # (last 4-digits only, if applicable)	Current Account Value (Note: Distributions should be listed in Step 1 above)
<input type="checkbox"/> None			
			\$
Total			\$

Motor Vehicles and Recreation Vehicles (Including Motorcycles, ATV's, Boats, etc.) (Names of Joint Owners)	Year	Make and Model	Estimated Value (Value = what you could sell it for in its current condition)
<input type="checkbox"/> None			
			\$
Total			\$

Real Estate (Indicate address) (Name any Joint Owners) <input type="checkbox"/> None	Type of Property (Home, Rental, Land, etc.)	Estimated Value (Value = what you could sell it for in its current condition)
		\$
Total		\$

General Household and Other Personal Property <input type="checkbox"/> None	Estimated Value (Value = what you could sell it for in its current condition)
General Household and Other Personal Property (Total value except for items listed below.)	\$
Separately list and value items of significant value below, for example: Jewelry, Antiques, Collectibles, Artwork, etc.	
Total	\$

Miscellaneous Assets (List each one separately and be specific.) <input type="checkbox"/> None	Estimated Value (Value = what you could sell it for in its current condition)
	\$
Total	\$
Total Assets	\$
Enter this amount in Step 7.	

Step 4: Accrued Liabilities to Professionals

The conservator requests that the accrued expenses of this proceeding as of date of appointment as detailed below be approved by the court as identified in Step 2.

Type of Professional and Name of Individual	Amount Billed
Account Management - Professional	\$
Accountant/CPA	
Conservator-Non Professional	
Conservator-Professional	
Court Visitor	
Guardian-Non Professional	
Guardian - Professional	
Guardian Ad Litem (GAL)	

Legal Fees - Conservator	
Legal Fees - Guardian	
Legal Fees - GAL	
Legal Fees - Protected Person	
Other Professional Fees	
Total Accrued Expenses Enter totals below in Step 5 - Inventory of Liabilities/Debts.	\$

Step 5: Other Current Liabilities/Debts

Report the value of each liability/debt in the chart below as of date of appointment as identified in Step 2.

Description of Liability/Debt <input type="checkbox"/> None	Name of Creditor	Account Number <small>(last 4-digits only)</small>	Balance
Accrued expenses associated with this proceeding (Total Step 4 above)			\$
Mortgage (principal due only)			
Motor Vehicle Loan			
2 nd Mortgage/Home Improvement			
Student Loan/Tuition			
Credit Card			
Federal Taxes			
State / Local Taxes			
Other Loan/Liability/Debt (Please list)			
HELOC			
Reverse Mortgage			
Total Liabilities/Debt Enter this amount in Step 7.	\$		

Summary

Step 6: Summary of Financial Plan (Receipts/Income Minus Disbursements/Expenses)

Summarize the Financial Plan below after completing the detailed accounting information in Step 1 and Step 2.

	Projected Monthly Amount	Projected Annual Amount
(A) Receipts/Income (Total from Step 1)	\$ _____	\$ _____
(B) Disbursements/Expenses (Total from Step 2)	\$ _____	\$ _____

Net Income: (A) minus (B)	\$ _____	\$ _____
----------------------------------	----------	----------

Step 7: Summary of Inventory

Summarize the Inventory below after completing the detailed accounting information in Step 3 and Step 5.

(A) Total Assets (Total from Step 3) \$ _____

(B) Total Liabilities/Debt (Total from Step 5) \$ _____

Net Worth: (A) minus (B)	\$ _____
---------------------------------	----------

- By checking this box, I am acknowledging I am filling in the blanks and not changing anything else on the form.
- By checking this box, I am acknowledging that I have made a change to the original content of this form.

IMPORTANT

This document must be signed and dated by all conservators and served on the protected person and all interested parties, as indicated by the attached certificate of service.

A conservator is required to file an amended "Financial Plan" whenever there is a change in circumstances that requires a substantial deviation from the existing plan. In addition, if the conservator finds other property not included in the original "Inventory", or if the value of the listed property is inaccurate or misleading, the conservator must prepare and file an amended "Inventory" with the court. Copies of these amendments must be provided to all interested parties. § 15-14-418(5) C.R.S. § 15-14-419(2) C.R.S.

VERIFICATION

I declare under penalty of perjury under the law of Colorado that the foregoing is true and correct.

Executed on the _____ day of _____
(date)

Executed on the _____ day of _____
(date)

_____, _____,
(month) (year)

_____, _____,
(month) (year)

at _____
(city or other location, and state OR country)

at _____
(city or other location, and state OR country)

(printed name)

(printed name)

(Signature of Conservator/Successor)

(Signature of Co-Conservator/Successor, if any)

Attorney Signature, (if any)

Date

**THIS SECTION MUST BE COMPLETED CORRECTLY AND SIGNED
OR THE DOCUMENT MAY BE REJECTED.**

Colorado Law REQUIRES that the Conservator's Financial Plan with Inventory and Motion for Approval be served on the PROTECTED PERSON AND INTERESTED PERSONS pursuant to the Order Appointing Conservator, including minors 12 years of age or older (§ 15-14-404(4), C.R.S.). In the space below under the Certificate of Service, list the names, addresses, and method of delivery for each party listed on the Order Appointing Conservator and provide each party with a copy of this document.

CERTIFICATE OF SERVICE

I certify that on _____ (date), a copy of this _____ (name of document) was served as follows on each of the following:

Name and Address	Relationship to Decedent, Ward, or Protected Person	Manner of Service*

*Insert one of the following: hand delivery, first-class mail, certified mail, e-service, or fax.

Signature

<input type="checkbox"/> District Court <input type="checkbox"/> Denver Probate Court _____ County, Colorado Court Address: <hr/> In the Interest of: Protected Person	<div style="text-align: center; border-top: 1px solid black; border-bottom: 1px solid black;"> ▲ COURT USE ONLY ▲ </div> Case Number: Division: Courtroom:
ORDER REGARDING CONSERVATOR'S FINANCIAL PLAN	

This matter comes before the court for approval of the Conservator's Financial Plan. The court having reviewed the Conservator's Financial Plan with Inventory and any responses or objections received from interested persons enters the following order:

The Financial Plan is **APPROVED**. The conservator is directed to file an amended Conservator's Financial Plan with Inventory whenever there is a change in the circumstances that requires a substantial deviation from this approved plan. **Approval does not relieve a conservator from fiduciary standards.**

The Financial Plan is **APPROVED** with the following **conditions**:

The Financial Plan is **NOT APPROVED** for the following reasons:

The conservator must file an amended Conservator's Financial Plan with Inventory by _____ (date).

The Conservator is directed to contact the court by _____ (date) to set this matter for hearing.

The setting of bond was deferred when the conservator was appointed.

The Conservator has requested the bond be set in the amount of \$ _____.

The court grants the request.

The court denies the request.

Pursuant to § 15-14-415, C.R.S., bond is now set in the amount of \$ _____. The bond must be posted with the court by _____ (date). If bond is posted by a surety, notice of any subsequent proceedings must be provided to the surety.

OR

The Conservator has requested the bond be waived.

The court grants the request. The Conservator will serve without bond for the following reason(s):

The court denies the request to waive bond. Bond amount stated above.

Date: _____

 Judge Magistrate

Occupation: _____ Your Relationship to Protected Person: _____

Street Address: _____

City: _____ State: _____ Zip Code: _____

Mailing Address, if different: _____

City: _____ State: _____ Zip Code: _____

Primary Phone: _____ Alternate Phone: _____

Email Address: _____

Have you had any criminal charges filed against you or convictions entered since the last report? Yes No

If Yes, explain: _____

***** Notice to Interested Persons:** Interested persons have the responsibility to protect their own rights and interests within the time and in the manner provided by the Probate Code, including the appropriateness of disbursements, the compensation of fiduciaries, attorneys, and others, and the distribution of estate assets. Interested persons may file an objection with the court. The court will not review or adjudicate these or other matters unless specifically requested to do so by an interested person.

PART B: CONSERVATORSHIP ISSUES

1. Is there a continued need for the conservatorship? Yes No If No, describe why and what steps should be taken. If you would like the court to take action, you *must* file a motion with the court.

2. Are the remaining assets in the estate sufficient to provide for the present and future care of the protected person? Yes No If No, describe why and what steps should be taken. If you would like the court to take action, you *must* file a motion with the court.

3. Should there be a change in scope of the conservatorship? Yes No If Yes, describe why and what steps should be taken. If you would like the court to take action, you *must* file a motion with the court.

4. **Attach a copy of the bond to this report, unless the bond was waived or not required by the court.** What is the amount of the bond? \$ _____. Is the amount of the bond sufficient to cover all unrestricted assets? Yes No If No, describe why and what steps should be taken. If you are requesting a change to the bond, you *must* file a motion with the court.

INSTRUCTIONS ON HOW TO COMPLETE THIS FORM

The Conservator's Report must be filed annually pursuant to §15-14-420, C.R.S. Part C of this report concerns the information necessary to satisfy the court that the conservator has maintained a complete accounting of all financial transactions and managed the protected person's estate responsibly.

Step 1 is a financial transaction detail and should be completed for each bank or investment account. A spreadsheet or report from personal accounting software may also be submitted in lieu of completing the transaction detail.

Individual Bank Account Summary

Beginning Cash Balance \$ _____ (Balance from prior year Report or Inventory)
Add: Total Amount of Income + \$ _____ (Total Income received from detail above)
Add: Total Amount Received as Transfer + \$ _____ (Total transferred from other bank accounts)
Less: Total Amount Disbursed - \$ _____ (Total disbursements from detail above)
Less: Total Amount Transferred out - \$ _____ (Total transfers moved to other accounts)

Ending Cash Balance = \$ _____ (Transfer this account balance to Step 5.)
 (This will be the beginning balance on next year's report)

Step 2: Receipts and Income

Column A: Is this the first annual Conservator's Report filed? Yes No

If **Yes**, use the amounts from the Inventory with Financial Plan (JDF 882) to complete Column A that is marked with an asterisk (*) below. If **No**, use the amounts from the prior Conservator's Report filed to complete Column A that is marked with an asterisk (*) below.

Column B: Transfer all individual income category totals from completed Detail Listing in Step 1 or attached spread sheet.

Column C: Calculate and record the difference between Column A and Column B.

Description of Receipt/Income Category	Column A *Total Amount of Receipts / Income from <input type="checkbox"/> Prior Reporting Period or <input type="checkbox"/> Financial Plan	Column B Total Amount of Receipts / Income for Current Reporting Period	Column C Change in Amount of Receipt/Income <i>Indicate +/-</i>
Asset Not Previously Reported			
Business Income			
Court Order Repayment			
Disability/Unemployment/Worker's Comp			
Distribution - Annuity			
Distribution – Pensions/Retirement Plan			
Distribution – Trust			
Farm/Ranch Income			
Gifts from Others			
Inheritance			
Insurance Settlement/Benefit			
Interest/Dividends			
Loan Repayment			
Oil/Gas/Mineral Royalties			
Other Public Assistance			
Other Receipts/Income			
Proceeds from Sale of Assets			
Rental Income			

Reverse Mortgage Payment			
Social Security			
Tax Refunds			
VA Benefits			
Wages			
TOTALS (Move to Step 7)			

Have Total Receipts/Income in Column B changed from the Prior Reporting Period or Financial Plan totals in Column A ? Yes No

If **Yes**, explain the changes below. Please include a description of any changes or unanticipated transactions. If income and expenses are anticipated to differ going forward, it may be necessary to file an Amended Inventory with Financial Plan and Motion for Approval (JDF 882) or a separate petition for approval with the court.

Step 3: Disbursements/Expenses

Column A: Use the amounts from the Inventory with Financial Plan (JDF 882) or from the prior Conservator’s Report filed to complete Column A that is marked with an asterisk (*) below.

Column B: Transfer all individual expense category “totals” from completed Detail Listing in Step 1 or attached spread sheet.

Column C: Calculate and record the difference between Column A and Column B.

Description of Disbursement / Expense Category	Column A *Total Amount of Disbursement / Expense from <input type="checkbox"/> Prior Reporting Period or <input type="checkbox"/> Financial Plan	Column B Total Amount of Disbursement / Expense for Current Reporting Period	Column C Change in amount of Disbursement/ Expense Indicate +/-
List Total Disbursements/Expenses from Detail Listing (From Step 1 or Separate Spreadsheet)			
Assisted Living/Care Facility			
Bank/Investment Account Fees			
Business Expenses (Not Farm or Ranch)			
Caregiver/In-Home Provider			
Charitable Contributions			
Clothing			
Collectibles			
Debt Repayment (excluding CC)			
Debt Repayment (Credit Card)			
Distributions - Protected Person			
Education/Tuition/Student Loan			
Entertainment/Movies			
Equipment			
Farm/Ranch Expense			
Fees – Accountant/CPA			

Fees – Conservator – Non-Prof			
Fees – Conservator-Prof			
Fees – Court Visitor			
Fees – Guardian – Non-Prof			
Fees – Guardian - Prof			
Fees – Guardian Ad Litem (GAL)			
Fees-Investment Acct Management			
Fees – Legal for Conservator			
Fees – Legal for Guardian			
Fees – Legal for GAL			
Fees – Legal for Protected Person			
Fees–Other Professional			
Funeral			
Gifts			
Groceries/Hygiene/Household Supplies			
HOA Fees			
Hobbies			
Home Furnishings			
Insurance – Home/Renter			
Insurance – Life			
Insurance – Long Term Care			
Insurance – Other			
Jewelry			
Livestock			
Loan Interest			
Loans			
Medical-Doctor/Prof/Hospital			
Medical Furnishings/Supplies			
Medical-Insurance			
Medical-Medicab/Transportation			
Medical-Medications			
Medical-Other			
Mortgage			
Motor Vehicle – Insurance			
Motor Vehicle – Loan Payments			
Motor Vehicle – Registration/Other			
Motor Vehicle – Repairs/Maint/Fuel			
Moving Expenses			
Other Disbursement/Expense			
Other Transportation			
Pet Care			
Property Repairs/Maintenance			
Rent			
Restaurants/Dining Out			
School Supplies			
Services – Cleaning			
Services – Personal Care			

Subscriptions/Dues			
Taxes – FICA and Medicare			
Taxes – Income			
Taxes – Property and Assessments			
Travel/Vacations			
Utilities (Including Phone/Cell)			
TOTALS (Move these totals to Step 7)			

Step 4: Conservator, Guardian, and Professional Fees Detail

List all conservators, guardians, and professionals paid. Include the hourly rate, number of hours worked, fees and costs, as well a description of the services provided and the benefit to the estate.

Name of Conservator, Guardian, and Professional	Hourly Rate (Range)	No. of Hours Worked	Total Hourly Fees	Other Costs Charged	Brief Description of Services Provided and Benefit to the Estate
Account Management – Professional					
Accountant/CPA					
Conservator–Non-Professional					
Conservator - Professional					
Court Visitor					
Guardian – Non-Professional					
Guardian - Professional					
Guardian Ad Litem (GAL)					
Legal Fees-Conservator					
Legal Fees-Guardian					
Legal Fees-GAL					
Legal Fees- Protected Person					
Other Professional Fees					
TOTAL (Fees and Costs) (Move these totals to Step 3)					

Have Total Disbursements/Expenses in Step 3, Column B Increased or Decreased from the Prior Reporting Period or Financial Plan in Step 3, Column A?

Explain the changes below. Please include a description of any changes or unanticipated transactions. A separate petition for approval may need to be filed with the court for significant changes outside the amounts allowed in the Inventory and Financial Plan.

Step 5: Assets

Column A: List the last 4 digits of all bank, investment or other financial accounts.

Column B: List name of the bank or financial institution in which accounts are being held, or describe specific asset.

Column C: Use amounts from the original Inventory with Financial Plan (JDF 882) **or** from the prior Conservator's Report filed, to complete Column C marked with an asterisk (*) below.

Column D: List all cash and investment account balances. These should coincide and be transferred from the Ending Cash Balances on the Detail Listing in Step 1.

Column E: Calculate and record the difference between Column C and Column D.

Vehicles, real estate, and all other assets should be valued at what the asset could be sold for in its current condition (i.e. Fair Market Value).

Description of Asset (Identify all accounts)	Column A Account Number (last 4 digits)	Column B Name of Financial Institution or Description of Asset	Column C * Fair Market Value <input type="checkbox"/> as of Last Day of Prior Reporting Period or <input type="checkbox"/> Inventory	Column D Fair Market Value (as of Last Day of Current Reporting Period)	Column E Change in Value of Asset <i>Indicate +/-</i>
Checking Accounts Balance from Step 1					
Savings Accounts Balance from Step 1					
Certificate of Deposit					
Money Market					
Pre-Paid Debit Card					
Cash On Hand					
Stocks					
Bonds					
Mutual Fund					
Other Financial Investments					
Life Insurance (Cash Value)					
Pension/Retirement (Vested)					
IRA / 401(k)					
Annuities					
Loans from Estate					
Motor Vehicle					

Real Estate					
Home Furnishings					
Collectibles (e.g., stamps or coins)					
Jewelry					
Livestock					
Equipment					
Oil/Gas/Mineral Interest					
Other Personal Property					
List Other Assets					
TOTALS (Move these totals to Step 7)					

Have Total Assets in Step 5, Column D changed from the last day of the Prior Reporting Period or Inventory in Step 5, Column C? Yes No

Provide additional detail for any assets on the preceding schedule that were purchased during the reporting period. Include a description of the asset purchased, the purchase price, purchase date, and source of funding for the purchase (e.g. cash, loan, sale of another other asset, etc.).

Description of Asset	Purchase Price	Purchase Date	Purchase method

Provide detail for any assets on the preceding schedule that were sold during the reporting period. Include a description of the asset sold, the sale price, sale date, and use of funds proceeds from the sale (e.g. living expenses, extinguish debt, purchase of another asset, etc.).

Description of Asset	Sale Price	Sale Date	Use of Proceeds

Please include a description of any other changes to the value of estate assets.

Step 6: Liabilities/Debts

Column A: List the last 4 digits of all account or loan numbers.

Column B: List the name of the bank or financial institution to which loans or debts are being paid.

Column C: Use amounts from the original Inventory with Financial Plan (JDF 882) **or** from the prior Conservator’s Report filed, to complete Column C marked with an asterisk (*) below.

Column D: List all *current* balances due on loans and debts.

Column E: Calculate and record the difference between Column C and Column D.

Description of Liability/Debt (Identify all accounts)	Column A Account Number (last 4-digits only)	Column B Name of Financial Institution	Column C *Balance Due on Last day of <input type="checkbox"/> Prior Reporting Period or <input type="checkbox"/> Inventory	Column D Balance Due on Last Day of of Current Reporting Period	Column E Change in Amount of Liability Indicate +/-
Mortgage (principal due only)					
Motor Vehicle Loan					
2 nd Mortgage/Home Improvement					
Student Loan/Tuition					
Reverse Mortgage					
HELOC					
Credit Card					
Federal Taxes					
State / Local Taxes					
Other Loan/Liability/Debt					
TOTALS (Move these totals to Step 7)					

Have Total Liabilities/Debts changed from the last day of the Prior Reporting Period or Inventory?

Yes **No** If **Yes**, explain the changes below. Please include a description of any changes or unanticipated transactions. A separate petition for approval may need to be filed with the court for significant changes outside the amounts allowed in the Inventory and Financial Plan.

Step 7: Summary

Summary of Financial Activity

	<i>*Prior Reporting Period (or Financial Plan)</i>	<i>Current Reporting Period</i>
(A) Total Receipts/Income from Step 2	\$ _____	\$ _____
(B) Total Disbursements/Expenses from Step 3	\$ _____	\$ _____
(A) minus (B) = Net Income	\$ _____	\$ _____

**Summary of Net Worth
Fair Market Value of Assets Minus Liabilities/Debts**

	<i>*Last Day of Prior Reporting Period (or Inventory)</i>	<i>Last Day of Current Reporting Period</i>
(A) Total Assets from Step 5	\$ _____	\$ _____
(B) Total Liabilities/Debts from Step 6	\$ _____	\$ _____
(A) minus (B) = Net Worth	\$ _____	\$ _____

- By checking this box, I am acknowledging I am filling in the blanks and not changing anything else on the form.
- By checking this box, I am acknowledging that I have made a change to the original content of this form.

**REPORT MUST BE SIGNED AND DATED BY ALL CONSERVATORS
 AND SERVED ON THE PROTECTED PERSON AND ALL INTERESTED PARTIES
 AS INDICATED BY THE ATTACHED CERTIFICATE OF SERVICE**

VERIFICATION

I declare under penalty of perjury under the law of Colorado that the foregoing is true and correct.

Executed on the _____ day of
(date)

Executed on the _____ day of
(date)

_____, _____,
(month) (year)

_____, _____,
(month) (year)

at _____
(city or other location, and state OR country)

at _____
(city or other location, and state OR country)

(printed name)

(printed name)

(Signature of Conservator/Successor)

(Signature of Co-Conservator/Successor, if any)

Attorney Signature, (if any)

Date

**IMPORTANT
THIS SECTION MUST BE COMPLETED CORRECTLY AND SIGNED
OR THE REPORT MAY BE REJECTED.**

Colorado Law **REQUIRES** that the Conservator's Report be served on the **PROTECTED PERSON AND INTERESTED PERSONS** pursuant to Order Appointing Conservator, including minors 12 years of age or older (§15-14-404(4), C.R.S.). In the space below under the Certificate of Service, list the names, addresses, and method of delivery for each party listed on the Order Appointing Conservator and provide each party with a copy of this Report.

NOTE: If you wish to change the persons entitled to receive copies of reports or other documents filed, you must file a separate motion with the court.

CERTIFICATE OF SERVICE

I certify that on _____ (date), a copy of this _____ (name of document) was served as follows on each of the following:

Name and Address	Relationship to Decedent, Ward, or Protected Person	Manner of Service*

*Insert one of the following: hand delivery, first-class mail, certified mail, e-service, or fax.

Signature

<input type="checkbox"/> District Court <input type="checkbox"/> Denver Probate Court _____ County, Colorado Court Address: _____ In the Matter of the Estate of: Deceased		▲ COURT USE ONLY ▲
Attorney or Party Without Attorney (Name and Address): _____ Phone Number: _____ E-mail: _____ FAX Number: _____ Atty. Reg. #: _____		Case Number: _____ Division _____ Courtroom _____
APPLICATION FOR INFORMAL PROBATE OF WILL AND INFORMAL APPOINTMENT OF PERSONAL REPRESENTATIVE		

***** Use this form if the decedent left a will *****

The applicant, an interested person pursuant to § 15-10-201(27), C.R.S., makes the following statements:

1. Information about the applicant:

Name: _____ Relationship to Decedent: _____
Street Address: _____
City: _____ State: _____ Zip Code: _____
Mailing Address, if different: _____
City: _____ State: _____ Zip Code: _____
Primary Phone: _____ Alternate Phone: _____
Email Address: _____

2. The Decedent _____ (name) died on _____ (date) at the age of ____ years. The decedent was domiciled or resided in the City of _____ County of _____, the State of _____.

3. Venue for this proceeding is proper in this county because the decedent:
 had his or her domicile or residence in this county on the date of death.
 did not have his or her domicile or residence in Colorado, but had property located in this county on the date of death.

4. This application is filed within the time period permitted by law. Three years or less have passed since the decedent's death, or circumstances described in § 15-12-108, C.R.S. authorize tardy probate or appointment.

5. The applicant:
 has not received a Demand for Notice of Filings or Orders and is unaware of any Demand for Notice of Filings or Orders concerning the decedent.
 has received or is aware of a Demand for Notice of Filings or Orders concerning the Decedent. See attached Demand for Notice of Filings or Orders or explanation.

6. No court has appointed a personal representative and no such appointment proceeding is pending in this state or elsewhere.

A court has appointed a personal representative, or an appointment proceeding is pending in the State of _____ (Attach a statement explaining the circumstances and indicating the name and address of the personal representative. Attach a certified copy of the appointing document if the appointment has been finalized.)

7. The date of the decedent's last will is _____.

The dates of all codicils are _____.

The will and any codicils are collectively referred to as "the Will." The applicant believes that it is the decedent's last will and that it was validly executed.

Except as may be disclosed in an attached explanation and after the exercise of reasonable diligence, the applicant is unaware of any instrument revoking the will and is unaware of any prior wills relating to property in Colorado that were not expressly revoked by a later instrument.

The original will:

Was deposited with this court before the decedent's death. (§ 15-11-515, C.R.S.);

Has been delivered to this court since the decedent's death. (§ 15-11-516, C.R.S.); or

Is filed with this application.

An e-filed copy of the will is filed with this application.

The original will be delivered to the court forthwith.

The will is an electronic will executed in compliance with § 15-11-1305, C.R.S. and an e-filed copy of the will is filed with this application.

The will is an electronic will executed in compliance with § 15-11-1305, C.R.S. and a certified paper copy of the will pursuant to § 15-11-1309, C.R.S. is filed with this application.

The will has been probated in the State of _____. Authenticated copies of the will and of the statement probating it are filed with this application. (§ 15-12-402, C.R.S.)

8. Decedent's marital and family status:

a) Did a spouse or partner in a civil union survive the decedent? Yes No

b) Did the decedent have a surviving parent? Yes No

c) Did the decedent have surviving children or other descendants? Yes No

d) Does the decedent's surviving spouse or partner in a civil union have surviving descendants who are not descendants of the decedent? Yes No

e) Are all of the decedent's surviving descendants also descendants of the surviving spouse or partner in a civil union? Yes No

f) Are any of the decedent's children minors? Yes No

9. **The names and addresses of the decedent's spouse, partner in a civil union, children, other heirs and devisees are as follows:**

- If a guardian or conservator has been appointed for one of the persons listed below, also provide the name and address of the guardian or conservator.
- If a minor child is listed, list the child's parent(s), guardian or conservator.
- If a spouse, partner in a civil union, or child has predeceased the decedent, include the date of death.
- A sample of this section is included in the Instructions - JDF 906.

Name	Address or Date of Death	Age, only if Minor	Relationship (e.g. spouse, partner in a civil union, child, brother, guardian for spouse, etc.)

10. Applicant is 21 years of age or older and nominates himself/herself to be appointed as personal representative.

Or

Applicant is 21 years of age or older and nominates himself/herself to be appointed as co-personal representative along with the following as a co-personal representative.

Name: _____ The Nominee is 21 years of age or older.

Street Address: _____

City: _____ State: _____ Zip Code: _____

Mailing Address, if different: _____

City: _____ State: _____ Zip Code: _____

Primary Phone: _____ Alternate Phone: _____

Email Address: _____

Or

Applicant nominates the following person be appointed as personal representative.

Name: _____ The Nominee is 21 years of age or older.

Street Address: _____

City: _____ State: _____ Zip Code: _____

Mailing Address, if different: _____

City: _____ State: _____ Zip Code: _____

Primary Phone: _____ Alternate Phone: _____

Email Address: _____

11. The nominee has priority for appointment because of:

statutory priority. (§ 15-12-203, C.R.S.)

reasons stated in the attached explanation.

Persons with prior or equal rights to appointment are as follows:

All person(s) (other than those identified in Paragraph 10 above) with prior or equal right to appointment have renounced their right to appointment (JDF 912SC). All required renuncements accompany this application.

12. The personal representative may receive compensation.

The hourly rates to be charged, any amounts to be charged pursuant to a published fee schedule, including the rates and basis for charging fees for any extraordinary services, and any other bases upon which a fee charged to the estate will be calculated, are as stated below or in an attachment to this application. *

The basis of compensation has not yet been determined.*

* There is a continuing obligation to disclose any material changes to the basis for charging fees. (§ 15-10-602 C.R.S.)

13. The personal representative may compensate his, her, or its counsel.

The hourly rates to be charged, any amounts to be charged pursuant to a published fee schedule, including the rates and basis for charging fees for any extraordinary services, and any other bases upon which a fee charged to the estate will be calculated, are as stated below or in an attachment to this application.*

The basis of compensation has not yet been determined.*

* There is a continuing obligation to disclose any material changes to the basis for charging fees. (§ 15-10-602 C.R.S.)

14. Bond is not required by the will and no interested person demanded that bond be filed. (Skip #15 below.)

Bond is required by will or is being demanded by an interested person. (Complete #15 below.)

Bond in the amount of \$ _____ has been demanded.

15. Applicant states the following regarding the decedent's estate if required by § 15-12-604, C.R.S.

Estimated value of real estate	\$
Estimated value of personal property	\$
Annual income expected from all sources	\$
TOTAL	\$

16. The applicant requests that the registrar informally admit the decedent's will to probate and that the nominee be informally appointed as personal representative in unsupervised administration to serve:

without bond with bond in the amount of \$ _____

and that Letters Testamentary be issued.

By checking this box, I am acknowledging I am filling in the blanks and not changing anything else on the form.

By checking this box, I am acknowledging that I have made a change to the original content of this form.

VERIFICATION

I declare under penalty of perjury under the law of Colorado that the foregoing is true and correct.

Executed on the _____ day of
(date)

Executed on the _____ day of
(date)

_____, _____,
(month) (year)

_____, _____,
(month) (year)

at _____
(city or other location, and state OR country)

at _____
(city or other location, and state OR country)

(printed name)

(printed name)

(Signature of Applicant)

(Signature of Co-Applicant, if any)

Attorney Signature, (if any)

Date

Note:

- Please remember to add any AKA names in the caption, if applicable.
- Pursuant to § 15-12-304, C.R.S. the Application must be declined if (a) one or more of a known series of testamentary instruments, other than a will and one or more codicils thereto, the latest of which does not expressly revoke the earlier; or (b) a copy of the decedent's original will certified by the State Court Administrator.

District Court <input type="checkbox"/> Denver Probate Court _____ County, Colorado Court Address: _____ <hr/> In the Matter of the Estate of: Deceased	
Attorney or Party Without Attorney (Name and Address): _____ Phone Number: _____ E-mail: _____ FAX Number: _____ Atty. Reg. #: _____	▲ COURT USE ONLY ▲ Case Number: _____ Division _____ Courtroom _____
PETITION FOR FORMAL PROBATE OF WILL AND FORMAL APPOINTMENT OF PERSONAL REPRESENTATIVE	

***** Use this form if the decedent left a will *****

The petitioner, an interested person pursuant to § 15-10-201(27), C.R.S., makes the following statements:

1. Information about the petitioner:

Name: _____ Relationship to Decedent _____
 Street Address: _____
 City: _____ State: _____ Zip Code: _____
 Mailing Address, if different: _____
 City: _____ State: _____ Zip Code: _____
 Primary Phone: _____ Alternate Phone: _____
 Email Address: _____

2. The decedent, _____, died on _____ (date) at the age of ____ years. The decedent was domiciled or resided in the City of _____ County of _____, State of _____.

3. Venue for this proceeding is proper in this county because the decedent:
 had his or her domicile or residence in this county on the date of death.
 did not have his or her domicile or residence in Colorado, but had property located in this county on the date of death.

4. This petition is filed within the time period permitted by law. Three years or less have passed since the decedent's death, or circumstances described in § 15-12-108, C.R.S. authorize tardy probate or appointment.

5. The Petitioner:
 has not received a Demand for Notice of Filings or Orders and is unaware of any Demand for Notice of Filings or Orders concerning Decedent.
 has received or is aware of a Demand for Notice of Filings or Orders concerning Decedent. See attached Demand for Notice of Filings or Orders or explanation.

6. No court has appointed a personal representative and no such appointment proceeding is pending in this state or elsewhere.

A court has appointed a personal representative, or an appointment proceeding is pending in the State of _____ (Attach a statement explaining the circumstances and indicating the name and address of the personal representative. Attach a certified copy of the appointing document if the appointment has been finalized.)

7. Except as may be disclosed in an attached explanation and after the exercise of reasonable diligence, the petitioner is unaware of any instrument revoking the will and is unaware of any prior wills relating to property in Colorado that have not been expressly revoked by a later instrument.

Or

The date of the decedent's last will is _____.

The dates of all codicils are _____.

The will and any codicils are collectively referred to as "the will". The petitioner believes that it is the decedent's last will and that it was validly executed.

8. The original will:

Was deposited with this court before the decedent's death (§ 15-11-515, C.R.S.)

Has been delivered to this court since the decedent's death (§ 15-11-516, C.R.S.)

Is filed with this petition.

Other: _____

An e-filed copy of the will is filed with this petition.

The original will be delivered to the court forthwith.

The will is an electronic will executed in compliance with § 15-11-1305, C.R.S. and an e-filed copy of the will is filed with this application.

The will is an electronic will executed in compliance with § 15-11-1305, C.R.S. and a certified paper copy of the will pursuant to § 15-11-1309, C.R.S. is filed with this application.

The will is a certified copy of the original will that has been certified by the State Court Administrator under § 15-23-116, C.R.S.

The will has been probated in the State of _____. Authenticated copies of the will and of the statement probating it are filed with this petition. (§ 15-12-402, C.R.S.)

9. Decedent's marital and family status:

a) Did a spouse or partner in a civil union survive the decedent? Yes No

b) Did the decedent have a surviving parent? Yes No

c) Did the decedent have surviving children or other descendants? Yes No

d) Does the decedent's surviving spouse or partner in a civil union have surviving descendants who are not descendants of the decedent? Yes No

e) Are all of the decedent's surviving descendants also descendants of the surviving spouse or partner in a civil union? Yes No

f) Are any of the decedent's children minors? Yes No

10. The names and addresses of the decedent's spouse, partner in a civil union, children, other heirs, and devisees are as follows:

◆ If a guardian or conservator has been appointed for one of the persons listed below, also provide the name and address of the guardian or conservator.

◆ If a minor child is listed, list the child's parent(s), guardian, or conservator.

◆ If a spouse, partner in a civil union, or child has predeceased the Decedent, include the date of death.

◆ A sample of this section is included in the Instructions - JDF 906.

Name	Address or Date of Death	Age, only if Minor	Relationship (e.g. spouse, partner in a civil union, child, brother, guardian for spouse, etc.)

11. Petitioner is 21 years of age or older and nominates himself or herself to be appointed as personal representative.

Or

Petitioner is 21 years of age or older and nominates himself/herself to be appointed as co-personal representative along with the following as a co-personal representative.

Name: _____ The Nominee is 21 years of age or older.

Street Address: _____

City: _____ State: _____ Zip Code: _____

Mailing Address, if different: _____

City: _____ State: _____ Zip Code: _____

Primary Phone: _____ Alternate Phone: _____

Email Address: _____

Or

Petitioner nominates the following person be appointed as Personal Representative.

Name: _____ The Nominee is 21 years of age or older.

Street Address: _____

City: _____ State: _____ Zip Code: _____

Mailing Address, if different: _____

City: _____ State: _____ Zip Code: _____

Primary Phone: _____ Alternate Phone: _____

Email Address: _____

12. The nominee has priority for appointment because of:

- Statutory priority. (§ 15-12-203, C.R.S.)
- Reasons stated in the attached explanation.

Persons with prior or equal right to appointment are as follows:

All person(s) (other than those identified in Paragraph 11 above) with prior or equal right to appointment have renounced their right to appointment (JDF 912SC). All required renouncements accompany this petition.

13. Bond is not required by the will and no interested person demanded that bond be filed. (Skip #14 below.)
- Bond is required by will or is being demanded by an interested person. (Complete #14 below.)
- Bond in the amount of \$ _____ has been demanded.

14. Petitioner states the following regarding the decedent's estate, if required by § 15-12-604, C.R.S.

Estimated value of real estate	\$
Estimated value of personal property	\$
Annual income expected from all sources	\$
TOTAL	\$

15. The personal representative may receive compensation.

- The hourly rates to be charged, any amounts to be charged pursuant to a published fee schedule, including the rates and basis for charging fees for any extraordinary services, and any other bases upon which a fee charged to the estate will be calculated, are as stated below or in an attachment to this petition. *

- The basis of compensation has not yet been determined.

* There is a continuing obligation to disclose any material changes to the basis for charging fees. (§ 15-10-602 C.R.S.)

16. The personal representative may compensate his, her, or its counsel.

- The hourly rates to be charged, any amounts to be charged pursuant to a published fee schedule, including the rates and basis for charging fees for any extraordinary services, and any other bases upon which a fee charged to the estate will be calculated, are as stated below or in an attachment to this petition. *

- The basis of compensation has not yet been determined.

* There is a continuing obligation to disclose any material changes to the basis for charging fees. (§ 15-10-602 C.R.S.)

17. Unsupervised administration is requested.

Supervised administration is requested (additional filing fee required). Terms of the requested supervision are as follows:

After notice and hearing, the petitioner requests that the court formally admit the decedent's will to probate, determine the heirs of the decedent and formally appoint the nominee as personal representative to serve:

without bond with bond in the amount of _____.

in unsupervised administration in supervised administration (additional filing fee required)

and that Letters Testamentary be issued to the personal representative or that previously issued Letters be confirmed. The petitioner also requests:

a setting aside of prior informal findings as to testacy.

a setting aside of prior informal appointment of personal representative.

other: _____

By checking this box, I am acknowledging I am filling in the blanks and not changing anything else on the form.

By checking this box, I am acknowledging that I have made a change to the original content of this form.

VERIFICATION

I declare under penalty of perjury under the law of Colorado that the foregoing is true and correct.

Executed on the _____ day of _____
(date)

Executed on the _____ day of _____
(date)

_____, _____,
(month) (year)

_____, _____,
(month) (year)

at _____
(city or other location, and state OR country)

at _____
(city or other location, and state OR country)

(printed name)

(printed name)

(Signature of Petitioner)

(Signature of Co-Petitioner, if any)

Attorney Signature, (if any)

Date

Note:

- Please remember to add any AKA names in the caption, if applicable.

<input type="checkbox"/> District Court <input type="checkbox"/> Denver Probate Court _____ County, Colorado Court Address: <hr/> In the Matter of the Estate of: Deceased	▲ COURT USE ONLY ▲ <hr/> Case Number: Division: _____ Courtroom: _____
ORDER ADMITTING WILL TO FORMAL PROBATE AND FORMAL APPOINTMENT OF PERSONAL REPRESENTATIVE	

Upon consideration of the Petition for Formal Probate of Will and Formal Appointment of Personal Representative filed by _____ (petitioner) on _____ (date),

THE COURT FINDS, DETERMINES, AND ORDERS:

1. The petitioner is an interested person and has filed a complete and verified petition.

2. The decedent died on _____ (date) and 120 hours have elapsed since the decedent's death.

3. The decedent was domiciled or resided in the City of _____ County of _____, State of _____.

4. Venue is proper in this county.

5. The petition was filed within the time period permitted by law.

6. Any required notices have been given or waived.

7. The decedent left a will dated _____.
 The dates of all codicils are _____.
 The will and any codicils are referred to as the will.
 The original will, electronic will executed in compliance with § 15-11-1305, C.R.S., certified by the State Court Administrator under § 15-23-116, C.R.S., and/or e-filed copy of the duly executed, unrevoked will is in the registrar's possession.
 There are no known prior wills that have not been expressly revoked by a later instrument.
 The will is admitted to formal probate.
 The prior informal finding as to testacy is set aside.

8. The heirs of the decedent are:

Name	Relationship (e.g. spouse, partner in a civil union, child, brother, guardian for spouse, etc.)

9. The following person is qualified to serve and is appointed or confirmed as personal representative:

Name: _____ The Nominee is 21 years of age or older.

Street Address: _____

City: _____ State: _____ Zip Code: _____

Mailing Address, if different: _____

City: _____ State: _____ Zip Code: _____

Primary Phone: _____ Alternate Phone: _____

Email Address: _____

The prior informal appointment of _____ (name) is set aside and the letters are revoked.

10. The personal representative will serve

without bond.

with bond in the amount of \$_____.

in unsupervised administration.

in supervised administration as described in an attachment to this order.

11. Letters Testamentary will be issued or previously issued letters are confirmed.

Date: _____

 Judge Magistrate

<input type="checkbox"/> District Court <input type="checkbox"/> Denver Probate Court _____ County, Colorado Court Address: _____ <hr/> In the Matter of the Estate of: Deceased	
Attorney or Party Without Attorney (Name and Address): _____ Phone Number: _____ E-mail: _____ FAX Number: _____ Atty. Reg. #: _____	▲ COURT USE ONLY ▲ Case Number: _____ Division _____ Courtroom _____
PETITION FOR FORMAL APPOINTMENT OF SPECIAL ADMINISTRATOR PURSUANT TO § 15-12-614, C.R.S.	

The petitioner, an interested person pursuant to § 15-10-201(27), C.R.S., makes the following statements:

1. Information about the petitioner:

Name: _____ Relationship to Decedent _____
Street Address: _____
City: _____ State: _____ Zip Code: _____
Mailing Address, if different: _____
City: _____ State: _____ Zip Code: _____
Primary Phone: _____ Alternate Phone: _____
Email Address: _____

2. The decedent, _____, died on _____ (date) at the age of ____ years. The decedent was domiciled or resided in the City of _____ County of _____, State of _____.

3. Venue for this proceeding is proper in this county because the decedent:
 had his or her domicile or residence in this county on the date of death.
 did not have his or her domicile or residence in Colorado, but had property located in this county on the date of death.

4. This petition is filed within the time period permitted by law. Three years or less have passed since the decedent's death, or circumstances described in § 15-12-108, C.R.S. authorize tardy probate or appointment.

5. The petitioner:
 has not received a Demand for Notice of Filings or Orders and is unaware of any Demand for Notice of Filings or Orders concerning Decedent.
 has received or is aware of a Demand for Notice of Filings or Orders concerning Decedent. See attached Demand for Notice of Filings or Orders or explanation.

6. No court has appointed a personal representative and no such appointment proceeding is pending in this state or elsewhere.

A court has appointed a personal representative or an appointment proceeding is pending in the State of _____ . (Attach a statement explaining the circumstances and indicating the name and address of the personal representative. Attach a certified copy of the appointing document if the appointment has been finalized.)

7. Except as may be disclosed in an attached explanation and after the exercise of reasonable diligence, the petitioner is unaware of any instrument revoking the will and is unaware of any prior wills relating to property in Colorado that have not been expressly revoked by a later instrument.

or

The date of the decedent's last will is _____ .

The dates of all codicils are _____ .

The will and any codicils collectively are referred to as "the will." The petitioner believes that it is the decedent's last will and that it was validly executed.

8. The original will:

Was deposited with this court before the decedent's death (§ 15-11-515, C.R.S.)

Has been delivered to this court since the decedent's death (§ 15-11-516, C.R.S.)

Is filed with this petition.

An e-filed copy of the will is filed with this petition.

The original will be delivered to the court forthwith.

The will is an electronic will executed in compliance with § 15-11-1305, C.R.S. and an e-filed copy of the will is filed with this petition.

The will is an electronic will executed in compliance with § 15-11-1305, C.R.S. and a certified paper copy of the will pursuant to § 15-11-1309, C.R.S. is filed with this petition.

The will is a certified copy of the original will that has been certified by the State Court Administrator under § 15-23-116, C.R.S.

The will has been probated in the State of _____ . Authenticated copies of the will and of the statement probating it are filed with this petition. (§ 15-12-402, C.R.S.)

9. Decedent's marital and family status:

a) Did a spouse or partner in a civil union survive the decedent? Yes No

b) Did the decedent have a surviving parent? Yes No

c) Did the decedent have surviving children or other descendants? Yes No

d) Does the decedent's surviving spouse or partner in a civil union have surviving descendants who are not descendants of the decedent? Yes No

e) Are all of the decedent's surviving descendants also descendants of the surviving spouse or partner in a civil union? Yes No

f) Are any of the decedent's children minors? Yes No

10. List names and addresses of decedent's spouse, partner in a civil union, children, heirs and devisees.

◆ If a guardian or conservator has been appointed for one of the persons listed below, also provide the name and address of the guardian or conservator.

◆ If a minor child is listed, list the child's parent(s), guardian or conservator.

◆ If a spouse, partner in a civil union, or child has predeceased the decedent, include the date of death.

Name	Address or date of death	Age, only if Minor	Relationship (e.g. spouse, partner in a civil union, child, brother, guardian for spouse, etc.)

11. Petitioner requests appointment of a special administrator to preserve the estate or to secure its proper administration for the following reasons: (§ 15-12-614(1)(b), C.R.S.)

12. Petitioner is 21 years of age or older and nominates himself or herself to be appointed as special administrator.

Or

Petitioner nominates the following person be appointed as special administrator.

Name: _____ The Nominee is 21 years of age or older.

Street Address: _____

City: _____ State: _____ Zip Code: _____

Mailing Address, if different: _____

City: _____ State: _____ Zip Code: _____

Primary Phone: _____ Alternate Phone: _____

Email Address: _____

13. The nominee has priority for appointment because of:

statutory priority (§§ 15-12-203, 15-12-615, and 15-12-621(9), C.R.S.)

reasons stated in the attached explanation

The persons with prior or equal right to appointment are _____(name).

All persons with prior or equal right to appointment have executed a required renouncement that accompanies this application.

No notice has been given because an emergency exists and appointment should be made immediately.

14. Petitioner states the following regarding the decedent's estate. (§ 15-12-604, C.R.S.)

Estimated value of real estate	\$
Estimated value of personal property	\$
Annual income expected from all sources	\$
TOTAL	\$

15. The special administrator may receive compensation.

The hourly rates to be charged, any amounts to be charged pursuant to a published fee schedule, including the rates and basis for charging fees for any extraordinary services, and any other bases upon which a fee charged to the estate will be calculated, are as stated below or in an attachment to this petition. *

The basis of compensation has not yet been determined.

* There is a continuing obligation to disclose any material changes to the basis for charging fees. (§ 15-10-602 C.R.S.)

16. The special administrator may compensate his, her or its counsel.

The hourly rates to be charged, any amounts to be charged pursuant to a published fee schedule, including the rates and basis for charging fees for any extraordinary services, and any other bases upon which a fee charged to the estate will be calculated, are as stated below or in an attachment to this petition. *

The basis of compensation has not yet been determined.

* There is a continuing obligation to disclose any material changes to the basis for charging fees. (§ 15-10-602 C.R.S.)

17. Bond is not required by the will (if any) nor has any interested person demanded that bond be filed.

Bond in the amount of \$ _____ has been demanded.

After notice and hearing, the petitioner requests that the court formally appoint the nominee as special administrator to serve:

without bond. with bond in the amount of \$ _____

and that Letters of Special Administration be issued.

By checking this box, I am acknowledging I am filling in the blanks and not changing anything else on the form.

By checking this box, I am acknowledging that I have made a change to the original content of this form.

VERIFICATION

I declare under penalty of perjury under the law of Colorado that the foregoing is true and correct.

Executed on the _____ day of
(date)

Executed on the _____ day of
(date)

_____, _____,
(month) (year)

_____, _____,
(month) (year)

at _____
(city or other location, and state OR country)

at _____
(city or other location, and state OR country)

(printed name)

(printed name)

(Signature of Petitioner)

(Signature of Co-Petitioner, if any)

Attorney Signature, (if any)

Date

Note:

- Please remember to add any AKA names in the caption, if applicable.

<input type="checkbox"/> District Court <input type="checkbox"/> Denver Probate Court _____ County, Colorado Court Address: _____ 		
In the Matter of the Estate of: Deceased		▲ COURT USE ONLY ▲
Attorney or Party Without Attorney (Name and Address): _____ Phone Number: _____ E-mail: _____ FAX Number: _____ Atty. Reg. #: _____		Case Number: _____ Division _____ Courtroom _____
INFORMATION OF APPOINTMENT		

Important Notice

The court will not routinely review or adjudicate matters unless it is specifically requested to do so by a beneficiary, creditor, or other interested person. All interested persons, including beneficiaries and creditors, have the responsibility to protect their own rights and interests in the estate in the manner provided by the provisions of the Colorado Probate Code, § 15-10-101, et seq., C.R.S. by filing an appropriate pleading with the court by which the estate is being administered and serving it on all interested persons pursuant to § 15-10-401, C.R.S. All interested persons have the right to obtain information about the estate by filing a Demand for Notice pursuant to § 15-12-204, C.R.S.

To the heirs and devisees who have or may have an interest in this estate:

1. The decedent died on _____ (date).
2. The decedent left no will.
 The decedent left a will dated _____. The dates of all codicils are _____.
The will and any codicils were admitted to probate on _____ (date).
3. Proceedings in this matter are informal.
 Proceedings in this matter are formal.
4. _____ (name) was appointed as personal representative on _____ (date).
Pursuant to § 15-12-705(1)(a), C.R.S., the personal representative's address is as follows:
Street Address: _____
City: _____ State: _____ Zip Code: _____
Mailing Address (if different than the street address): _____
5. No bond has been filed with this court.
 Bond has been filed with this court in the amount of \$ _____.
6. Administration of this estate is unsupervised. The court will consider ordering supervised administration if requested by an interested person. (§ 15-12-501, et. seq., C.R.S.)
 Administration of this estate is supervised.

CERTIFICATE OF SERVICE

I certify that on _____ (date), a copy of this _____ (name of document) was served as follows on each of the following:

Name and Address	Relationship to Decedent, Ward, or Protected Person	Manner of Service*

*Insert one of the following: hand delivery, first-class mail, certified mail, e-service, or fax.

Signature

Note:

- This Information of Appointment must be given within 30 days of appointment of the personal representative. In the event a will exists but there has been no formal testacy proceeding and the personal representative was appointed on the assumption of intestacy, this Information of Appointment must also be given to the devisees named in any existing wills. A copy of this Information of Appointment and Certificate of Service must be promptly filed with the Court (§ 15-12-705, C.R.S.).

CERTIFICATE OF SERVICE

I certify that on _____ (date), a copy of this _____ (name of document) was served as follows on each of the following:

Name and Address	Relationship to Decedent, Ward, or Protected Person	Manner of Service*

*Insert one of the following: hand delivery, first-class mail, certified mail, e-service, or fax.

Signature

Note:

- Upon the filing of this document, unless otherwise ordered by the court, the court's Notice and Order Closing Estate After Three years will be set aside without further action by the court.

<input type="checkbox"/> District Court <input type="checkbox"/> Denver Probate Court _____ County, Colorado Court Address: _____ In the Matter of the Estate of: Deceased	<p style="text-align: center;">▲ COURT USE ONLY ▲</p> <hr/> Case Number: _____ Division Courtroom
NOTICE AND ORDER CLOSING ESTATE AFTER THREE YEARS OR MORE	

To: _____ (attorney or personal representative)

This matter is before the court on the court's own motion.

It appears to the court that no action has been taken in the above-captioned estate for three years or more. Unless you show good cause why the court should not do so within 35 days from the date of this order, the court will close this estate and terminate the personal representative's appointment without further accounting, notice, report, hearing, or order. (§ 15-12-1009, C.R.S.)

If the administration of the estate is complete, no response is required. If the administration of the estate is not complete, the personal representative or attorney may file a Response (JDF 970) with the court.

Neither the personal representative nor any other person is discharged from any liability to this estate, the court or any other person, except that sureties upon any bond posted in these proceedings must be released as to any claim arising after closure of this estate pursuant to this order.

Date: _____

_____ Judge Magistrate Registrar

<input type="checkbox"/> District Court <input type="checkbox"/> Denver Probate Court _____ County, Colorado Court Address: _____ In the Matter of the Estate of: Deceased		▲ COURT USE ONLY ▲
Attorney or Party Without Attorney (Name and Address): _____ Phone Number: _____ E-mail: _____ FAX Number: _____ Atty. Reg.#: _____		Case Number: _____ Division Courtroom
PETITION TO RE-OPEN ESTATE		

The petitioner makes the following statements:

1. Information about the petitioner:

Name: _____ Relationship to Decedent _____
Street Address: _____
City: _____ State: _____ Zip Code: _____
Mailing Address, if different: _____
City: _____ State: _____ Zip Code: _____
Primary Phone: _____ Alternate Phone: _____
Email Address: _____

2. Pursuant to § 15-12-1008, C.R.S., the estate has been settled and the personal representative has been discharged or one year has passed since the closing statement has been filed with the court.

OR

Pursuant to § 15-12-1009, C.R.S., the court, on its own motion and after notice, entered an order closing the estate without further accounting.

3. Petitioner desires to re-open the estate:

to distribute property briefly described as:

other:

4. Petitioner nominates the following person to be appointed as personal representative:

Name: _____

Street Address: _____

City: _____ State: _____ Zip Code: _____

Mailing Address, if different: _____

City: _____ State: _____ Zip Code: _____ Primary Phone: _____

Alternate Phone: _____

Email Address: _____

The nominee is the previously appointed personal representative.

The previously appointed personal representative is unable or unwilling to serve and the nominee is 21 years of age or older, and the nominee has priority for appointment because of:

Nomination by the will.

Statutory priority. (§ 15-12-203, C.R.S.)

reasons stated below:

Persons with prior or equal rights to appointment have renounced their rights to appointment or have been given notice of these proceedings. **Any required renouncements accompany this petition.**

5. The persons to receive distribution have changed, as identified below:

Name	Address or Date of Death	Age, only if Minor	Relationship (e.g. spouse, partner in a civil union, child, brother, guardian for spouse, etc.)

The persons to receive distribution have not changed from the original proceedings. Distribution is as follows:

Name of Person Receiving Distribution	Address of Person Receiving Distribution	Description of Distribution

6. The personal representative may receive compensation.

The hourly rates to be charged, any amounts to be charged pursuant to a published fee schedule, including the rates and basis for charging fees for any extraordinary services, and any other bases upon which a fee charged to the estate will be calculated, are as stated below or in an attachment to this application.

The basis of compensation has not yet been determined.

7. The personal representative may compensate his, her, or its counsel.

The hourly rates to be charged, any amounts to be charged pursuant to a published fee schedule, including the rates and basis for charging fees for any extraordinary services, and any other bases upon which a fee charged to the estate will be calculated, are as stated below or in an attachment to this application.

The basis for compensation has not yet been determined.

8. **Petitioner requests that the court, after such notice as it may direct, re-open the estate and appoint the personal representative identified in section 4 above. In addition, the petitioner requests the court:**

issue Letters of Administration.

issue Letters Testamentary.

upon reporting to the court that the above purposes have been accomplished, the personal representative's appointment shall terminate and estate re-closed.

Other: _____

By checking this box, I am acknowledging I am filling in the blanks and not changing anything else on the form.

By checking this box, I am acknowledging that I have made a change to the original content of this form.

VERIFICATION

I declare under penalty of perjury under the law of Colorado that the foregoing is true and correct.

Executed on the _____ day of
(date)

Executed on the _____ day of
(date)

_____, _____,
(month) (year)

_____, _____,
(month) (year)

at _____
(city or other location, and state OR country)

at _____
(city or other location, and state OR country)

(printed name)

(printed name)

(Signature of Petitioner)

(Signature of Co-Petitioner, if any)

Attorney Signature, (if any)

Date

2. It is further ordered that the personal representative send an Information of Appointment (JDF 940) to the following parties:

The same as for the initial appointment of personal representative in this case; or

Name	Relationship to Decedent

3. Upon reporting to this court that the personal representative has accomplished the above purposes, the appointment of the personal representative shall terminate, and this estate shall be re-closed.

4. Other: _____

Date: _____

 Judge Magistrate Registrar

Amended and Adopted by the Court, En Banc, January 5, 2023. Effective immediately.

By the Court:

**Richard L. Gabriel
Justice, Colorado Supreme Court**