

INVENTORY & ANNUAL ACCOUNTS

Conservators of Legally Incapacitated adults or minors (CA & CY files) & Guardians of the Estate for a Developmentally Disabled adults (DD Files)* are required to file an initial Inventory of all the Wards assets listing the values and balances **as of the day of your appointment** (or as close to the date of your appointment as possible). The Inventory must be filed within 56 days of your appointment. Your first Annual Account must be filed annually with the Court within 56 day of the anniversary of your appointment as Conservator or Guardian of the Estate.

Example: If you were appointed Conservator on May 17th of 2020 the **Inventory** must be filed with the Court no later than July 12th 2020 (56 days). The first Annual Account must be filed with the Court no later than July 12, 2021 (365 days plus 56 days). Your “reporting period” for the Annual Account will be May 17th 2020 through May 16th 2021. The reporting period will **always** be the previous 365 days, you cannot report on dates in the future.

Failure to file your Annual Report with the Court on time may result in your Conservatorship/Guardianship of the Estate being suspended.

Annual Account Forms:

INVENTORY (CONSERVATORSHIP) PC674 – For CA, CY, & DD files - **only file once**

ACCOUNT OF FIDUCIARY, SHORT FORM PC583 (most often used) file annually

ACCOUNT OF FIDUCIARY, LONG FORM PC584 (less often used) only file the PC583 or the PC584 annually

PETITION TO ALLOW ACCOUNT(S) PC585a must be filed with all Account(s)

PROOF OF SERVICE PC564 a copy of your Inventory and/or Annual Account must be served to all interested parties and a Proof of Service filed with the Court when you file your Account

PROOF OF RESTRICTED ACCOUNT PC669 **required for minor (CY) files only**

A BANK STATEMENT FOR THE MONTH ENDING THE REPORTING PERIOD IS REQUIRED FOR ALL ACCOUNTS (SEND ONLY **ONE** BANK STATEMENT FOR EACH ACCOUNT THE WARD MAY HAVE)

[Type here]

***Not all DD Guardianship require an Annual Account if you are required to file an Account it will be indicated on your initial Order from the Court appointing you as Guardian.**