CONSERVATORSHIP



Annual Account

Part 1: Petition for Approval of Annual Conservator's Account

(Forms)

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Self-Service Center

ANNUAL ACCOUNT OF CONSERVATOR

CHECKLIST

Use the forms and instructions in this packet only if the following factors apply to your situation:

- You have been appointed the conservator for an adult or minor; AND
- You have *completed* at least one annual account (the *first* account or Form 6) as a guardian or conservator for this case; AND
- You want to file court papers to have this annual account approved by the court.

READ ME: Consulting a lawyer before filing documents with the court may help prevent unexpected results. A list of lawyers you may hire to advise you on handling your own case or to perform specific tasks, as well as a list of court-approved mediators can be found on the Self-Service Center website.

Self-Service Center

CONSERVATORSHIP

PETITION FOR APPROVAL OF ANNUAL ACCOUNT

PART 1: THE COURT PAPERS

FORMS

This packet contains court forms and instructions to file for approval of an annual account for a conservatorship. Items in **BOLD** are forms that you will need to file with the Court. Non-bold items are instructions or procedures. Do not copy or file those pages!

Order	File Number	Title	#
			pages
1	PBCF7k	Checklist: You may use these forms if	1
2	PBCF7ft	Table of Contents (this page)	1
3	PBCF70f	Coversheet for Conservator's Annual Account (AOC Form 7)	2
4	PBCF71f	Conservator's Account Form	10
5	PBCF62f	Amended Budget Form (Optional)	2
6	PBCF43f	Transaction Log (Optional*)	1
7	PBGCF45f	Fee Statement and Proof of Mailing	2
8	PBCF47f	Response to Court Accountant Report (if necessary)	1
9	PBCF48f	Notice of Hearing	1
10	PBCF49f	Court Order Regarding Petition for Approval of Annual Account	2

^{*}You may use and follow the format of this form or present a copy of a checkbook register or printout of an account register from accounting software such as Quicken™.

The documents you have received are copyrighted by the Superior Court of Arizona in Maricopa County. You have permission to use them for any lawful purpose. These forms shall not be used to engage in the unauthorized practice of law. The Court assumes no responsibility and accepts no liability for actions taken by users of these documents, including reliance on their contents. The documents are under continual revision and are current only for the day they were received. It is strongly recommended that you verify on a regular basis that you have the most current documents.

Addro	ess (if not State, Zip bhone: I Address er's Bar N ised Fidud	protected): Code: : : lumber: ciary Number: Self, without a Lawyer or Attorn		For Clerk's Use Only spondent
		00. =	OURT OF ARIZONA OPA COUNTY	
In t	the Matter	of the Conservatorship for	Case No. PB	
Na □	Minor (or	otected Person r) person age 17.5 or older)	SUBMISSION OF AN FOR APPROVAL OF CONSERVATOR'S A (FORM 7) with BUDGET with BUDGET AMI with Fee Statemer	ENDMENT
		ONS: For approval of annual account, TIONER STATES UNDER		·
1.		This account covers the account to (date).	reporting period from (date) and	, ,
2.		Attached is a correct statement of protected person during this accurans actions I conducted or allow this period of time are fully dedocuments. I request that the Co	count reporting period. The ved on behalf of the Ward or escribed, itemized, and sumr	summary of all financial protected person during marized on the attached
3.		Unless otherwise ordered by the following order:	court, attach the REQUIRED [OOCUMENTS in the

	☐ SCHEDULE 1: Statement of Receipt	s and Disbursements
	☐ WORKSHEET A: Other Receipts and	d Disbursements Detail
	☐ Amended Budget (if applicable)	
	☐ SCHEDULE 2: Statement of Net Ass	ets and Reconciliation
	☐ WORKSHEET B (if applicable): Other	r Inventory and Liabilities Detail
	☐ SCHEDULE 3: Statement of Sustaina	ability of Conservatorship
	☐ WORKSHEET C (if applicable): Adjust	stments Detail
	☐ Financial Statements, which include account reporting period, for each fine	de the account, balance at the end of the ancial account
	☐ Transaction Log , detailing all finance reporting period just ended, reported	cial transactions during the current account by category
INS	TRUCTIONS: For approval of fee statemen	ts, put a check mark in box number 4:
	ached is a copy of the Fee Statement , for you check this box, attach the Fee Statement)	
	CONSERVATOR'S CER	TIFICATION
accompanying s	the information in this report is true	re read and reviewed this form, and after reasonable inquiry have a good e, accurate and complete to the best of
Date	Conse	vator's Signature
	Printed	Name

Case No.: PB_____

Form 7: Conservator's Account

Description of the Requierd Schedules and Worksheets							
Schedule 1: Statement of Receipts and Disbursements	Provides budgeted and actual receipts and disbursements						
Worksheet A	Supporting detail of Other Income, Expenses, and Administrative Fees and Costs						
Schedule 2: Statement of Net Assets & Reconciliation	Provides a summary of the estate inventory & updated inventory values						
Worksheet B	Supporting detail of Other General Assets, Money-Denominated Assets, Bills and Payables More Than 30 Days Old, and Debts						
Schedule 3: Statement of Sustainability of Conservatorship	Calculates estimated sustainability of the estate						
Worksheet C	Supporting detail of Adjustments to Net Assets or Net Income/(Net Expenses)						

Do Not File this Instruction Page

Instructions on How to Navigate Throughout the Excel Document

- 1. Navigating from one schedule/worksheet to another:
 - a. You may use the tabs located on the bottom of the screen labeled "Schedule 1, Worksheet A, etc.; by clicking on the tabs, you can select the specified schedule or worksheet you would like to complete.
 - b. Once you leave a page, you may go back and forth between the pages by clicking on the tabs.
- 2. Additional Worksheets
 - a. If you need additional space to provide supporting detail for either Worksheet A, Worksheet B, or Worksheet C, right click on the tabs below and select "unhide"; choose the specified worksheet you would like to complete.
- 3. Save/Print
 - a. Remember to save your information, as you will need to use the information in subsequent accounts.
 - i. To save the document, click on the Office Button in the upper left corner and choose "Save As."
 - ii. To print, click on the Office Button in the upper left corner and choose "Print"
 - a. Once in print, you may print the schedules and worksheets individually by selecting "Print" while in the specified page; or
 - b. You can print the entire account by selecting "Print" and then click "Entire Workbook" in the print settings.
- 4. Automatic Calculations
 - a. When completing the account in Excel, embedded formulas will automatically populate certain fields (i.e. totals, percentages, change from prior period, etc.). Fields that will be automatically calculated are shaded green; you will not need to do anything in these fields as the computer will generate the value.

Effective: September 1, 2012

In the matter of:				Case No.			
Form 7: Conservator's Account	Column A	Column B	Column C	Column D	Column E	Column F	Column G
Schedule 1: Statement of Receipts and Disbursements	Past		Pre	sent		Future	
·	Actual Results Prior Period: See Prior Period Schedule 1, Column C	Budget See Prior Period Schedule 1, Column F Period Ju	Actual Results est Ended:	Change from Budget	Change as Percent Column D divided by	Budget Current Year:	Budget Change From Actual Results Period Just Ended
1 Start Date of Account Reporting Period: (Example: 07/01/2011) 2 End Date of Account Reporting Period:				Column C minus Column B	Column B and multiplied by 100		Column F minus Column C
Receipts (Money Received): 3 Retirement and Disability Income			Τ				
4 Annuities, Structured Settlements, and Trust Income 5 Wages and Earned Income							
6 Investment and Business Income 7 Other Receipts (Attach WS A) 8 Total Receipts (Add lines 3 through 7)							
Assets/Liabilities as Receipts Total Income Included in Receipts (Line 8 minus line 9)							
Disbursements (Money Spent): Money Spent for Protected Person:							
11 Food, Clothing, and Shelter							
12 Medical Costs							
13 Personal Allowance							
14 Payments on Debt							
15 Discretionary Expenses							
16 Other Disbursements (Attach WS A)							
17 Total Disbursements for Protected Person (Add lines 11 through 16)							
Money Spent for Administrative Fees & Costs:					'		
18 Fiduciary Fees and Costs							
19 Fiduciary's Attorney Fees and Costs							
20 Protected Person's Attorney Fees and Costs							
21 Other Administrative Fees and Costs (Attach WS A)							
22 Total Administrative Fees and Costs (Add lines 18 through 21)							
23 Total Disbursements (Add lines 17 and 22)							
24 Assets/Liabilities as Disbursements							
25 Total Expenses in Disbursements (Line 23 minus line 24)							
26 Total Surplus/(Total Shortfall) (Line 8 minus line 23)							
27 Net Income/(Net Expenses) (Line 10 minus line 25)							

In the matter of:			Case No.			
Start Date of Account Reporting Perio	od Just Ended:					
WORKSHEET A			Ca	tegory	Column	F: Total (For Page)
Supporting Detail for Form 7, Sche	edule 1:		Line 7: Other Receipts			
Other Receipts; Other Disburse		tive Fees and Costs	Line 16: Other Disburse	ments		
			Line 21: Other Administ	trative Fees and Costs		
Other Receipts (Li	ine 7)	Other Disbursements	(Line 16)	Other Administrati	ve Fees and	Costs (Line 21)
	Column F:		Column F:			Column F:
Description	Budget Current Year	Description	Budget Current Year	Description		Budget Current Year
	Amount		Amount			Amount

In the matter of:			Case No.			
Start Date of Account Reporting Period Just Er	nded:					
WORKSHEET A Cont.			Car	tegory	Column F: To	tal (For Page)
Supporting Detail for Form 7, Schedule 1:			Line 7: Other Receipts			
Other Receipts; Other Disbursements; O	ther Administrative	Fees and Costs	Line 16: Other Disburse	ments		
			Line 21: Other Administ	trative Fees and Costs		
		•		•		
Other Receipts (Line 7)		Other Disbursements ((Line 16)	Other Administration	ve Fees and Costs	(Line 21)
Description Budge	t Current Year Amount	Description	Column F: Budget Current Year Amount			Column F: get Current Year Amount

Liabilities (Debt): 16 Bills & Payables More Than 30 Days Old (Attach WS B) 17 Other Debts (Attach WS B) 18 Total Liabilities (Add lines 16 and 17) 19 Net Assets (Line 15 minus line 18) Section 2: Reconciliation of Conservator's Account Reconciliation of Cash and Regular Bank Accounts: 20 Starting Cash Balance (Enter Column A, Line 14) 21 Total Receipts (Schedule 1, Column C, line 8) 22 Available Funds (Add lines 20 and 21) 23 Total Disbursements (Schedule 1, Column C, line 23)	In the matter of:			Case No.		
Schedule 2: Statement of Net Assets & Reconciliation Value Value Prom Prior Period: P	Form 7: Conservator's Account	Column A	Column B	Column C	Column D	Column E
Value From Pilor Period Succession From Pilor Period Period Substantial From Pilor Period Substantial Period Period Substantial Period		i		i .		
Section 1: Net Assets (Inventory) 1 Inventory Value Report Date: (sample: 07/01/2011) 2 Real Estate 3 Vehicle(5) 5 Household Items and Personal Effects 5 Household Items and Personal Effects 6 Stocks, Bonds, and Mutual Funds: Not Tax-Deferred 7 Tax-Deferred Assets (Add lines 2 and Assets (Ad	Solicadic 2. Statement of Net / 155cts & Netonomation	7	-	_	_	
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Section 1: Net Assets (Inventory) Section 2: Net Assets (Inventory) Section 3: Net Assets (Inventory) Section 4: Net Assets (Inventory) Section 4: Net Assets (Inventory) Section 4: Net Assets (Inventory) Section 5: Net Assets (Inventory) Section 6: Net Assets (Inventory) Section 6: Net Assets (Inventory) Section 6: Net Assets (Inventory) Section 7: Net Assets (Inventory) Section 6: Net Assets (Inventory) Section 7: Net Assets (Inventory) Section 8: Net Inventory (Period:		111011 61104		Explanation of change
Inventory Value Report Date: (Example: 07/01/2011)	Section 1: Net Assets (Inventory)			Column B minus	· ·	
General Assets, Excluding Cash and Bank Accounts: 2 Real Estate 3 Vehicle(s) 4 Business Ownership Interests 5 Household Items and Personal Effects 6 Stocks, Bonds, and Mutual Funds - Not Tax-Deferred 7 Tax-Deferred Assets 8 Other General Assets (Attach WS 8) 9 Total General Assets (Attach WS 8) 10 Bank Accounts - Nestricted Access 11 Bank Accounts - Unrestricted Access 12 Cash on Hand 13 Other Money-Denominated Assets (Attach WS 8) 14 Total Cash and Bank Accounts (Add lines 10 through 13) 15 Total Available Assets (Add lines 9 and 14) 16 Bills & Payables More Than 30 Days Old (Attach WS 8) 17 Other Debts (Attach WS 8) 18 Total Liabilities (Debt): 18 Total Liabilities (Add lines 16 and 17) 19 Net Assets (Line 15 minus line 18) 19 Net Assets (Line 15 minus line 18) 19 Net Assets (Line 15 minus line 18) 10 Section 2: Reconciliation of Conservator's Account Reconciliation of Cash and Regular Bank Accounts: 2 Available Funds (Add lines 20 and 21) 23 Total Disbursements (Schedule 1, Column C, line 8) 2 Total Receipts (Schedule 1, Column C, line 8) 2 Available Funds (Add lines 20 and 21) 23 Total Disbursements (Schedule 1, Column C, line 8)		Schedule 2, Column B	Just Ended.			
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Section 2: Reconciliation of Conservator's Account Reconciliation of Cash and Regular Bank Accounts: 20 Starting Cash Balance (Enter Column A, line 14) 21 Total Receipts (Schedule 1, Column C, line 8) 22 Available Funds (Add lines 20 and 21) 23 Total Disbursements (Schedule 1, Column C, line 23)	18 Total Liabilities (Add lines 16 and 17)					
Reconciliation of Cash and Regular Bank Accounts: 20 Starting Cash Balance (Enter Column A, line 14) 21 Total Receipts (Schedule 1, Column C, line 8) 22 Available Funds (Add lines 20 and 21) 23 Total Disbursements (Schedule 1, Column C, line 23) Starting Cash Balance comes from Column A, Line 14 Starting Cash Balance comes from Column A, Line 14 Starting Cash Balance comes from Column A, Line 14	19 Net Assets (Line 15 minus line 18)					
Reconciliation of Cash and Regular Bank Accounts: 20 Starting Cash Balance (Enter Column A, line 14) 21 Total Receipts (Schedule 1, Column C, line 8) 22 Available Funds (Add lines 20 and 21) 23 Total Disbursements (Schedule 1, Column C, line 23) Starting Cash Balance comes from Column A, Line 14 Starting Cash Balance comes from Column A, Line 14 Starting Cash Balance comes from Column A, Line 14	Section 2: Reconciliation of Conservator's Account	•				
Starting Cash Balance (Enter Column A, line 14) Total Receipts (Schedule 1, Column C, line 8) Available Funds (Add lines 20 and 21) Total Disbursements (Schedule 1, Column C, line 23)						
Total Receipts (Schedule 1, Column C, line 8) Available Funds (Add lines 20 and 21) Total Disbursements (Schedule 1, Column C, line 23)				Starting Cash Ba	alance comes fi	rom Column A. Line 14
Available Funds (Add lines 20 and 21) Total Disbursements (Schedule 1, Column C, line 23)				1		•
23 Total Disbursements (Schedule 1, Column C, line 23)				1		
				1		
				Ending Cash Ba	lance must equ	al Column B, Line 14

In the matter of:					Case No.			
Start Date of Account Report	ting Period Just E	nded:						
WORKSHEET B				Cate	egory		Column B: To	tal (For Page)
Supporting Detail for Forr	n 7, Schedule 2:			Line 8: Other General Assets				
Other General Assets;		nominated Assets;		Line 13: Other Money-Denon	ninated Assets			
Bills and Payables More				Line 16: Bills and Payables M	ore Than 30 Days	Old		
				Line 17: Other Debts				
		Other Money-Denomin	ated Assets	Bills and Payab	les			
Other General Assets	s (Line 8)	(Line 13)	ateu Assets	More Than 30 Days Ol			Other Debts (Line	17)
Description/ Explanation of Change	Column B: Updated Inventory Value	Description/ Explanation of Change	Column B: Updated Inventory Value	Description/ Explanation of Change	Column B: Updated Inventory Value		/ Explanation of hange	Column B: Updated Inventory Value

In the matter of:					Case No.			
Start Date of Account Report	ting Period Just E	nded:						
WORKSHEET B Cont.				Cate	egory		Column B: To	tal (For Page)
Supporting Detail for Forr	n 7, Schedule 2:			Line 8: Other General Assets	5			
Other General Assets;		nominated Assets;		Line 13: Other Money-Denon	ninated Assets			
Bills and Payables More				Line 16: Bills and Payables M	ore Than 30 Days	Old		
				Line 17: Other Debts				
	(II a)	Other Money-Denomin	ated Assets	Bills and Payab	les		2.1 2.1. //	\
Other General Assets	s (Line 8)	(Line 13)		More Than 30 Days Ol			Other Debts (Line	17)
Description/ Explanation of Change	Column B: Updated Inventory Value	Description/ Explanation of Change	Column B: Updated Inventory Value	Description/ Explanation of Change	Column B: Updated Inventory Value		/ Explanation of hange	Column B: Updated Inventory Value

In the matter of:				Case No.	
Form 7: Conservator's Account	Column A	Column B	Column C	Column D	Column E
Schedule 3: Statement of Sustainability of Conservatorship	Sustainability Estimated in Prior Period See Prior Period Schedule 3, Column B	Updated Sustainability Estimated	Change from Prior Period	Change as Percent Column C divided by Column A and multiplied by	Explanation of Adjustment in <i>Column B</i>
1 Report Date of Sustainability Estimate: (Example: 07/01/2011)			Column A	100	
Net Assets Available to Conservatorship:					
2 Net Assets (See Schedule 2, line 19)					
3 Adjustments (Attach WS C)					
4 Adjusted Net Assets (Add lines 2 and 3)					
Recurring Net Income/(Net Expenses):					
5 Net Income/(Net Expenses) (See Schedule 1, line 27)					
6 Adjustments (Attach WS C)					
7 Adjusted Net Income/(Net Expenses) (Add lines 5 and 6)					
8 Enter Adjusted Net Assets (Line 4) 9 Enter Adjusted Net Income/(Net Expenses) (Absolute Value of line 7) 10 Estimated Years of Sustainability (Line 8 divided by line 9)					
11 Is Conservatorship Sustainable? (Yes or No)					
Prior Period Management Plan (Complete if "No" is entered in Column A, Line 11: Provide Management Plan Going Forward as indicated in Prior Period Schedule 3)				_	Going Forward ed in Column B, Line 11)

NOTICE TO RECIPIENT OF THIS SCHEDULE:

The Conservator's estimates and analyses of Adjusted Net Assets, Adjusted Net Income/(Net Expenses), and Sustainability are good faith estimates based upon information that is reasonably available to the Conservator concerning the Protected Person. This information is provided for the limited purpose of assisting the court in its oversight of this conservatorship.

In the matter of:		Case No.				
Start Date of Account Reporting Period Just Ended:						
WORKSHEET C		Category	Column B: Total (For Page)			
Supporting Detail for Form 7, Schedule 3:		Line 3: Adjustments to Net Assets Available to				
Adjustments to Net Assets Available to Conser		Conservatorship				
Adjustments to Recurring Net Income/(Net Ex	penses)	Line 6: Adjustments to Recurring Net Income/ (Net Expenses)				
*Note: If adjustment is negative, place () around the	amount or a minus sign in front of th					
Adjustments to Net Assets Available to C		Adjustments to Recurring Net Income/(N	- Net Expenses) (Line 6)			
Description/ Explanation of Adjustment	Column B: Updated Sustainability Estimated Adjustment Amount	Description/ Explanation of Adjustment	Column B: Updated Sustainability Estimated Adjustment Amount			

In the matter of:		Case No.	
Start Date of Account Reporting Period Just Ended:			
WORKSHEET C Cont.		Category	Column B: Total (For Page)
· · · · · · · · · · · · · · · · · · ·		Line 3: Adjustments to Net Assets Available to	
Adjustments to Net Assets Available to Conser		Conservatorship	
		Line 6: Adjustments to Recurring Net Income/ (Net Expenses)	
*Note: If adjustment is negative, place () around the	amount or a minus sign in front of th	e amount	
Adjustments to Net Assets Available to O	Conservatorship (Line 3)	Adjustments to Recurring Net Income/(I	Net Expenses) (Line 6)
Description/ Explanation of Adjustment	Column B: Updated Sustainability Estimated Adjustment Amount	Description/ Explanation of Adjustment	Column B: Updated Sustainability Estimated Adjustment Amount

In the matter of:		Case No:	
Date of Amended Budget:			
	Column A	Column B	Column C
*Complete Only if Necessary	Previously Filed Budget (Schedule 1 , Column F OR Prior Amended Budget, Column B)	Amended Budget	Explanation of Change
	Currer	nt Year	
1 Start Date of Account Period (See SCHEDULE 1, Column F, Line 1):			
2 End Date of Account Period (See SCHEDULE 1 Column F, Line 2):			
Receipts (Money Received):			•
3 Retirement and Disability Income			
4 Annuities, Structured Settlements, and Trust Income			
5 Wages and Earned Income			
6 Investment and Business Income			
7 Other Receipts (Attach WS A)			
8 Total Receipts (Add lines 3 through 7)			
9 Assets/Liabilities as Receipts			
10 Total Income Included in Receipts (Line 8 minus line 9)			
Disbursements (Money Spent):			
Money Spent for Protected Person:		T	
11 Food, Clothing, and Shelter			
12 Medical Costs			
13 Personal Allowance			
14 Payments on Debt			
15 Discretionary Expenses			
16 Other Disbursements for Protected Person(Attach WS A)			
17 Total Disbursements for Protected Person (Add lines 11 through 16)			
Money Spent for Administrative Fees & Costs:			
18 Fiduciary Fees and Costs			
19 Fiduciary's Attorney Fees and Costs			
20 Protected Person's Attorney Fees and Costs			
21 Other Administrative Fees and Costs (Attach WS A)			
22 Total Administrative Cost (Add lines 18 through 21)			
23 Total Disbursements (Add lines 17 and 22)			
24 Assets/Liabilities as Expenses			
25 Total Expenses in Disbursements (Line 23 minus line 24)			
26 Total Surplus/(Shortfall) (line 8 minus line 23)			
27 Net Income/(Net Expenses) (line 10 minus line 25)			

In the matter of:			Case No.			
Date of Amended Budget:						
WORKSHEET A			Cat	egory	Columr	B: Total (For Page)
Supporting Detail for Amended Bud	lget:		Line 7: Other Receipts			
Other Receipts; Other Disbursen	nents; Other Administrativ	ve Fees and Costs	Line 16: Other Disbursem	nents		
			Line 21: Other Administra	ative Fees and Costs		
Other Receipts (Li	ne 7)	Other Disbursements	(Line 16)	Other Administrat	ive Fees and	l Costs (Line 21)
Description	Column B: Budget Current Year Amount	Description	Column B: Budget Current Year Amount	Description		Column B: Budget Current Year Amount
			1			

Effective: September 1, 2012

n the matter of:	Case No
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Transaction Log

(Use additional sheets if necessary)

End Date of Account Reporting Period:

Transaction Category	Date	Account No. (include last 4 digits of account number)	Transaction Type	Check number	Payer/Payee	Purpose/Description	Income Amount	Expense Amount

	ng:			
	not protected):			
City, State,	Zip Code:			
Email Addr	ess:		FOR CLE	RK'S USE ONLY
	ar Number:		TOROLL	THE OOL ONL!
Licensed Fi	iduciary Number:			
Representii	ng 🔲 Self, without a Lawyer or 🔲 Attorney for	Petitioner OR Re	espondent	
	SUPERIOR COUR IN MARICOP			
In the Ma	tter of the (check one or both)			
☐ Guardi	anship and/or Conservatorship of:	Case Number: PB _		
		FEE STATEMEN PROOF OF MAII		
☐ an Adul	t or 🗌 a Minor			
	TIONS: This document must be completed in a e charged must be specifically listed, such as tele document preparation, work in house of	ephone calls, meetings, sta	ff meetings,	
	WENT OF FEES FOR SERVICES: - (date) to	=	of fees for s	ervices rendered
DATE	DESCRIPTION AND SERVICE	PROVIDER	TIME	AMOUNT CHARGED
	<u>I</u>			1

NUMBER OF HOURS BILLED:		
Total number of hours billed isx \$	per hour = \$	TOTAL CHARGE
PROOF OF MAILING:		
A copy of this document was mailed or delivered to the fo	ollowing persons:	
NAME	ADDRESS	
	Today's Date:	

Your Signature:

Case No.

Person Filing: Address (if not protected): City, State, Zip Code: Telephone: Email Address: Lawyer's Bar Number: Licensed Fiduciary Number:		FOR CLERK'S USE ONLY
Representing Self, without a Lawyer or Atto	orney for 🔲 Petitioner OR	R Respondent
	COURT OF ARIZO	ONA
In the Matter of (check one or two) ☐ Guardianship ☐ Conservatorship	Case Number PB:	
an adult or a minor	REPORT#	COURT ACCOUNTANT (1st, 2nd, 3rd, etc.) INTING OF CONSERVATOR
State of Arizona) County of Maricopa) ss.		
I am the person responsible for submitting the report as follows: (Be sure to address each point ramended accounting and supporting documents restricted account file these separately. Use add	aised by the court accountan ,if required. Do not atta	t or the judge in the Order. Attach an
	SIGNED:	
Subscribed and sworn to before me this date:(N	by lonth/Day/Year)	-
My Commission Expires:		
Copy of the foregoing mailed this date:addresses:	, to the follo	wing individuals at the following

	Filing:		
	s (if not protected):		
-	ate, Zip Code: one:		
	ddress:		
Lawyer	's Bar Number:		FOR CLERK'S USE ONLY
License	ed Fiduciary Number:		
Represe	enting Self, without a Lawyer or Attorney for	Petitioner OR Re	espondent
	SUPERIOR COURT IN MARICOPA (
	Matter of (check one or both)	Case Number: PB_	
Gua	ardianship	HEARING REGA	N APPEARANCE ARDING ANNUAL
an A	Adult a Minor	ACCOUNTING	
	D THIS NOTICE CAREFULLY. An important cheduled. If you do not understand this Notice or the other cheduled. If you do not understand this Notice or the other cheduled. If you do not understand this Notice or the other cheduled. If you do not understand this Notice or the other cheduled. If you do not understand this Notice or the other cheduled. If you do not understand this Notice or the other cheduled. If you do not understand this Notice or the other cheduled. If you do not understand this Notice or the other cheduled. If you do not understand this Notice or the other cheduled. If you do not understand this Notice or the other cheduled. If you do not understand this Notice or the other cheduled. If you do not understand this Notice or the other cheduled.	er court papers, contac	t an attorney for legal advice. ving Petition and other court
	1		courty.
	2		
	3		
	4		
2.	COURT HEARING . A non-appearance court hear matters in the court papers as follows:	ng has been scheduled	d to consider the Petition and
	DATE AND TIME:		
	PLACE:		
	JUDICIAL OFFICER:		
3.	RESPONSE TO PETITION. This is a non-apper hearing unless you disagree with the Petition. If you Petition, you should come to the hearing and state you least 10 days prior to the hearing.	want the judge to know	w why you disagree with the
	DATED:	 Petitioner's Signature	
	(Month/Day/Year)	reunoner's Signatur	₽

Pers	on Signing	g Document:			
Addr	ress (if not	protected): Code:			
Tele	phone:				
Ema Law	il Address ver's Bar N	:lumber:	FOR CLERK'S USE	ON	
Lice	nsed Fiduo	ciary Number:			
Repr	esenting	☐ Self, without a Lawyer or ☐ Att	orney for Petitioner OR Respondent		
			COURT OF ARIZONA ICOPA COUNTY		
		f the (check one or both)	Case Number: PB		
☐ Guardianship ☐ Conservatorship of			COURT ORDER REGARDING PETITION FOR APPROVAL OF ANNUAL ACCOUNTING #		
(Name of Ward or Protected Person) (1st, 2nd, 3rd, etc., Simplified or Final) AND FEE STATEMENT (if applicable)					
unde	erstand it, o	SS OF THE COURT:	nat could affect your legal rights. Read it carefully. If you do r		
1.	A Petit	tion for Approval of Annual Accounting	g#was filed by		
2.	Notice	of the Petition was ☐ given as requir	red by law or waived by all interested persons or other:		
3.	The Pe	etition for Approval has been reviewed	by the Court Accountant and by the Court.		
IT	IS OR	DERED:			
1.		The Accounting is approved as su	ubmitted for the period fromto)	
		 The dates that the next accounting 	g period shall be due: ng period shall cover: nt of the fiduciary bond, if appropriate		
			OR		
		The Accounting is approved but v			
				_	

OR

		The Accounting is not approved. The Petitioner shall file with the court a written Response to the Court Accountant's Report, provide a copy of the Response to the Court Accountant and to all persons entitled to notice of the Annual Accounting, and shall address each and every recommendation of the Court Accountant by (date). If additional documentation or amended schedules are required by the Court Accountant, they shall be attached to the Petitioner's Response.
		Petitioner shall include a self-addressed, stamped envelope to the Court Accountant with the Response. Failure of Petitioner to fully address the Court Accountant's recommendations will result in the court setting a hearing date at which time the Petitioner will be required to appear in court to explain the accounting. The court may also order the Petitioner to personally bear additional expenses incurred in resolving the accounting issues.
2.		The fee statement is approved and fees are allowed in the amount of \$
		OR
		The fee statement is not approved and Petitioner is ordered to do the following things:
	DONE	: IN OPEN COURT:
	DONE	IN OPEN COURT: JUDICIAL OFFICER OF THE SUPERIOR COURT