

Self-Service Center

**PROCEDURES REGARDING  
PROOF BY DEPOSITORY OF RESTRICTED ACCOUNT**

**(GUARDIANSHIP OR CONSERVATORSHIP)**

1. **WHEN YOU NEED A PROOF BY DEPOSITORY:** If you are a conservator of a ward's money, or a guardian and the estate has **less than \$5,000**, you might have asked the Judge/Commissioner to order that some or all of the assets be restricted. If the Judge/Commissioner granted the restriction, you need to prove to the Judge/Commissioner that you obeyed the Order and had the assets placed in a restricted account. This court document is called the **PROOF OF RESTRICTED ACCOUNT**.
  2. **WHEN AND HOW TO GET A "PROOF OF RESTRICTED ACCOUNT":** Immediately after the Judge/Commissioner orders the restriction, take the money to a bank or other financial institution and inform the manager or staff that:
    - You are a conservator under court order. Bring with you a certified copy of the **LETTERS OF APPOINTMENT**.
    - You want the money placed in a restricted account as stipulated by the **ORDER**. Bring a copy of the **ORDER** authorizing the restriction. There are certain terms in the **ORDER** you and the financial institution need to obey.
    - After the money is deposited in a restricted account, have the bank or financial institution manager sign the **PROOF OF RESTRICTED ACCOUNT**, which must also be notarized. Keep the original to give it to the court.
  3. **FILING THE PROOF BY DEPOSITORY:** After the **PROOF OF RESTRICTED ACCOUNT** is signed and notarized, file the original with the **Clerk of the Court, Probate Registrar**. You should also send a copy to **Probate Court Administration**.
- Note:** You should also send a copy to the office of the Judge/Commissioner who signed the Order about the restricted account.
4. **WHAT ABOUT THE BOND:** Once the account is established and the **PROOF OF RESTRICTED ACCOUNT** is filed, you might qualify to have the bond reduced or dissolved, depending on the estate and what the **ORDER** said. If so, you might need an extra conformed (date-stamped) copy of the **PROOF OF RESTRICTED ACCOUNT** indicating that the restricted account is established and the proof is filed in the court records.
  5. **OTHER HELP:** If you still have questions about this procedure, you can ask a lawyer for legal advice. You can look up a lawyer in the telephone book under "attorneys." Also, the Self-Service Center has a list of lawyers who will help you help yourself. The list shows where the lawyers are located, how much they charge, and what their experience is.