

SELF-SERVICE CENTER

**PROCEDURES for  
PROOF OF RESTRICTED ACCOUNT**

1. **RESTRICTED ASSETS: WHAT DOES IT MEAN** if the court “restricts” an asset? When a court restricts an asset or account, it means that you are not allowed to use, sell, or transfer that asset without the court’s approval. The court can restrict any asset of the protected person’s estate but typically restricts bank accounts, brokerage accounts or real property. When the court restricts an asset, the restriction is outlined on your Letters of Appointment so that all parties will know what you can and cannot do as a conservator.
2. **WHEN YOU NEED PROOF OF RESTRICTED ACCOUNT:** If you are a Conservator of a protected person’s money, you may have asked the Judge or Commissioner to order that some or all of the protected person’s assets be restricted. If the Judicial Officer ordered the restriction, and this restriction is stated in your Letters of Appointment, you will need to show the court proof that you obeyed the Order and placed the assets in a restricted account. You do this by completing the following form: **PROOF OF RESTRICTED ACCOUNT (PBC91F)**, then filing this form within 30 days from the time the Letter or Order was issued.
3. **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:
  - a. You have been appointed a conservator by court order, and
  - b. The court order requires the money be placed in a restricted account.

Bring with you a **certified copy** of the **LETTERS OF APPOINTMENT** as well as a copy of the **ORDER** authorizing the restriction, (since the ORDER contains terms that both you and the financial institution will need to obey.

After the money is deposited in a restricted account, have the manager of the bank or other financial institution sign the **PROOF OF RESTRICTED ACCOUNT** form which must also be notarized. Make any copies necessary for yourself or for the financial institution, but **keep the original to file with the court.**

4. **FILING THE PROOF OF RESTRICTED ACCOUNT form:** After the PROOF OF RESTRICTED ACCOUNT form is signed and notarized at the bank; file the original form at the **Probate Clerk of the Court, within 30 days after the issuance of the Court Order or Letters of Appointment.**
5. **WHAT ABOUT THE BOND:** Once the account is established and the PROOF OF RESTRICTED ACCOUNT is filed, you may qualify to have the bond reduced or dissolved, depending on the estate and the terms of the court Order. If so, you might need an extra **date-stamped copy** of the PROOF OF RESTRICTED ACCOUNT indicating that the restricted account is established and that proof is filed in the court records.