Person Filing: _____

Address (if not protected): _____

City, State, Zip Code: _____

Telephone: _____

Email Address: _____

Lawyer's Bar Number: _____

Licensed Fiduciary Number: _____

Representing ☐ Self, without a Lawyer or ☐ Attorney for _____

For Clerk's Use Only

SUPERIOR COURT OF ARIZONA
IN MARICOPA COUNTY

In the Matter of the Conservatorship for

_____
Name of Protected Person

☐ a Minor
☐ an Adult (or person age 17.5 or older)

Case Number: _____

SUBMISSION OF AND PETITION for APPROVAL OF SIMPLIFIED CONSERVATOR'S ACCOUNT (FORM 9)

☐ With Budget
☐ With Budget Amendment
☐ With Fee Statement

Assigned to: _____
(Judicial Officer)

1. ☐ This account covers the account reporting period from _____ (date) to _____(date) and is due on _____ (date).

2. ☐ Attached is a correct statement of all financial dealings I had on behalf of the ward or protected person during this account reporting period. The summary of all financial transactions I conducted or allowed on behalf of the ward or protected person during this period of time are fully described, itemized, and summarized on the attached documents. I request that the Court enter an order approving this account.

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3. The required documents are attached in the following order:
    a. SCHEDULE 1: Statement of Receipts and Disbursements
    b. SCHEDULE 2: Statement of Net Assets and Reconciliation
    c. WORKSHEET B (if applicable): Other Inventory and Liabilities Detail
    d. SCHEDULE 3: Statement of Sustainability
    e. WORKSHEET C (if applicable): Adjustment Detail
    f. Financial Statements, which include the account balance at the end of the account reporting period, for each financial account.
    g. Transaction Log, detailing all financial transactions during the account reporting period just ended, reported by category

INSTRUCTIONS: For approval of fee statements, put a check mark in box number 4

4. ☐ Attached is a copy of the Fee Statement, for which I request approval. (If you check this box, attach the Fee Statement.)

5. ☐ The current value of the estate is: $ _____(Form 9, Schedule 2, Line 19)

CONSERVATOR'S CERTIFICATION

I, the undersigned, certify under penalty of perjury that the foregoing petition and the attachments to the petition are true and correct.

_____	_____	_____
Printed Name	Conservator's Signature	Date

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