

FORMS FOR CONSERVATOR OF AN ADULT

Forms must be filled out completely. All **ORIGINAL** forms get mailed to the Court; keep copies for your own record.

1. **What You Need to Know Before Filing a Petition** - this explains the duties and other requirements of a conservator.
2. **Petition for Appointment of Conservator, or Protective Order, with instructions for completing-** In order to begin the conservatorship process you will need to deliver (by mail or in person) the completed petition to the Court along with your payment of \$175.00 payable to Ottawa County Probate Court. If you mail the paperwork, please give the Court two-three days to receive and process your petition.
3. **Notice on Petition for Conservator or Protective Order-** this form should be given to the individual who is the subject of the petition along with a copy of the Petition to Appoint Conservator. This form explains to them the process of conservatorship and outlines their rights.
4. **Notice of Hearing-** Call 616-786-4110 to obtain a date and time for your Court hearing. Complete as much of the form as you are able, the rest of the information will be given to you by the Court when you call (date/time/file number).
5. **Proof of Service-** This form tells the Judge that you sent copies of the Petition to Appoint Conservator (and/or Protective Order) and Notice of Hearing to all interested parties. Interested parties include but may not be limited to the following:
 - a. The individual to be protected.
 - b. Spouse and children of the ward (if no spouse or children, then the heirs at law).
 - c. If known, any person named power of attorney or attorney in fact.
 - d. The nominated guardian or current guardian if already appointed.
 - e. Any government agency paying benefits in care of the individual for which an application may be pending.

Complete the proof of service by filling in the names and addresses of each person served under the appropriate heading; by regular mail or in person and include the date the service was made. **The Court requires that all interested persons be served the required documents no less than 14 days prior to the scheduled hearing if serving by regular mail and no less than 7 days before the scheduled hearing if serving by hand (in person).** Don't forget to **sign and date** the bottom of the form.

*****STOP PLEASE READ*****

You must make every effort to obtain addresses for the people you are required to serve, if you do not know an address you must do the following:

- ✓ **Check the phone book**
- ✓ **Complete an internet search, if possible**
- ✓ **Contact the Friend of the Court office for a last known address they may have on file**
- ✓ **Contact any known family members of the person in order to obtain a last known address**

Please make all necessary copies of your petition and notice of hearing (including one for yourself and one for each interested party) *ALL ORIGINAL DOCUMENTS NEED TO BE MAILED OR PERSONALLY DELIVERED TO THE COURT

6. **Acceptance of Appointment-** This is signed by the proposed guardian(s); this lets the Court know that the person accepts the guardianship and its responsibilities.
7. **Inventory-** This form is to be completed by the conservator; this is a list of all assets the protected person owns on the date the conservator was appointed. This form is due no later than 56 days from the date that the conservator was appointed.
8. **Proof of Service-** A copy of the inventory should be served on all the interested parties as listed above. You will complete this proof of service and provide it to the Court with your Inventory.
9. **Account of Fiduciary, Short form-** An accounting of income, expenditures and remaining assets by the conservator will be due to the Court annually. This form should be used when reporting this information to the Court, this form must balance accordingly. There is a \$20.00 filing fee due upon filing the account with the Court. There will be other forms required for filing with the annual accounting; you will be sent all necessary forms before your account is due. If you are unable to complete the account accurately please consider consulting an attorney or an accountant.
10. **Instructions on filing your annual account-** this form explain what is required on the annual accounting.

COURT STAFF IS PROHIBITED BY LAW FROM GIVING LEGAL ADVICE, IF YOU HAVE ANY LEGAL QUESTIONS DURING THIS PROCESS PLEASE CONTACT AN ATTORNEY.

Ottawa County Probate Court
12120 Fillmore Street
West Olive MI 49460

Hours: Mon-Fri 8:00 AM- 5:00 PM
Phone: 616-786-4110
Website: www.miottawa.org

WHAT YOU NEED TO KNOW BEFORE FILING A PETITION TO APPOINT A CONSERVATOR

»» What is a conservator?

A conservator is a person appointed by a probate court and given power and responsibility for the estate (financial assets and property) of an adult (called a *protected individual*).

»» What is a guardian?

A guardian is a person appointed by a probate court and given power and responsibility to make certain decisions about the care of another individual. These decisions might include treatment decisions or where the individual should live. If the individual has a reduced life expectancy due to advanced illness, the guardian may have the power to make an informed decision on behalf of the individual regarding receiving, continuing, discontinuing, or refusing medical treatment. A **full guardian** can make all decisions for the individual. A **limited guardian** can only make decisions for the individual that the court allows.

»» When would a conservator be needed?

A conservator may be needed when the individual is unable to manage his or her property and financial affairs effectively because of certain reasons and:

- 1) he or she has property that will be wasted or used up unless proper management is provided; or
- 2) funds are needed for the support, care, and welfare of the adult and any of his or her dependents.

A mentally competent adult who, because of age or physical limitation, may voluntarily petition the

court himself or herself for the appointment of a conservator to assist in managing his/her estate.

Some of the reasons that might prevent the individual from being able to manage his or her property and financial affairs are:

- 1) mental illness or deficiency;
- 2) physical illness or disability;
- 3) chronic use of alcohol /other intoxicants;
- 4) confinement;
- 5) detention by a foreign power; or
- 6) disappearance.

»» Is a conservator needed for an individual who cannot manage his or her property or financial affairs effectively?

A conservator might not be necessary if someone else already has legal authority (an individual with power of attorney, for example) to make decisions about the individual's estate and there are no problems with the decisions being made.

»» How is a proceeding for a conservator started?

Any person who is interested in the individual's welfare may complete a Petition for Appointment of Conservator (form PC 639) and file it, along with the filing fee, with the probate court.

»» Is a lawyer necessary?

No, but a lawyer can be helpful, especially if any interested person opposes the appointment of a conservator.

»» Can mediation be used for disagreements about a conservator?

Certain disagreements about a request for a guardian may be mediated outside the court if all parties agree to attend mediation or if a judge orders parties to attend mediation. The court clerk can tell you if

mediation services are available in your court.

»» What happens when the court accepts the petition for filing?

After the petition is accepted for filing, the court will appoint a *guardian ad litem* to represent the individual in the court proceeding unless the individual has his or her own lawyer or unless a mentally competent adult voluntarily requests the appointment.

It is important for you to cooperate with the guardian ad litem. The guardian ad litem does not have the authority to make decisions for the individual. The individual may have to pay for the guardian ad litem.

If necessary, the court may also order the individual to be examined by a physician or a mental health professional. The court may also send someone (called a *visitor*) to interview the individual. The visitor may be the guardian ad litem or a court officer or court employee.

»» Can the individual get a conservator immediately in an emergency?

If the court believes an individual's estate requires immediate protection before appointing a conservator, the court may issue a preliminary protective order. This order may involve the appointment of a special conservator. The order will authorize specific acts that provide for immediate protection of the individual's assets.

STATE OF MICHIGAN
PROBATE COURT
COUNTY OF OTTAWA

**PETITION FOR
APPOINTMENT OF CONSERVATOR
PROTECTIVE ORDER**

FILE NO.

- A** Estate of _____
Individual alleged to need protection (first, middle, and last name) Last four digits of SSN
- B** 1. I, _____, am interested in this matter
Name
and make this petition as _____.
State interest/relationship
- C** 2. The individual was born _____, resides in _____ County
Date
at _____
Address
_____ and has property in _____ County.
City, state, zip
- D** 3. An action within the jurisdiction of the family division of circuit court involving the family or family members of the above individual has been previously filed in _____ Court, Case Number _____, was assigned to Judge _____, and _____ remains _____ is no longer _____ pending.
- E** 4. The individual has _____
a power of attorney. (Specify name and address below.)
a guardian. (Specify name and address below.)
a representative payee for social security. (Specify name and address below.)
Name and address
- F** 5. a. The individual is an adult unable to manage his/her property and business affairs effectively because of
mental illness chronic use of drugs detention by a foreign power
mental deficiency chronic intoxication disappearance
physical illness or disability confinement _____
and either
the adult has property that will be wasted or dissipated unless proper management is provided, or
the adult or his/her dependents are in need of money for support, care, and welfare, and protection is necessary to obtain or provide money.
b. The adult petitioner is mentally competent but because of age or physical infirmity is unable to manage his/her property and affairs effectively, and recognizing the disability, requests appointment of a conservator.
c. The individual is a minor who
owns money or property that requires management or protection that cannot otherwise be provided.
has or may have business affairs that may be jeopardized or prevented by minority.
needs money for support and education, and protection is necessary or desirable to obtain or provide money.
d. I am the guardian of the ward and it is in the ward's best interests to sell or otherwise dispose of the ward's real property or interest in real property.
- G** 6. The statements in item 5 are supported by the following facts: _____
(Attach a separate sheet.)

(SEE SECOND PAGE)

USE NOTE: If this form is being filed in the circuit court family division, please enter the court name and county in the upper left-hand corner of the form.

Do not write below this line - For court use only

H 7. The individual to be protected has an estate approximately valued at:

\$ _____ \$ _____ \$ _____ \$ _____
Real property Personal property Insurance Monthly income

I 8. The individual to be protected is receiving the following benefits from governmental agencies:

Social Security \$ _____ SSI \$ _____ MDHHS \$ _____
Veterans Administration \$ _____, claimant number _____
Other: _____ \$ _____

J 9. The individual to be protected has

a spouse whose name and address are listed below.

child(ren) whose name(s) and address(es) are listed below.

descendants of deceased child(ren) whose name(s) and address(es) are listed below.

if no child(ren) or descendants of deceased child(ren), parents whose name(s) and address(es) are listed below.

if none of the above, presumptive heirs whose name(s) and address(es) are listed below.

none of the above (must notify the Attorney General - see instructions for the address of the Attorney General).

NAME	ADDRESS AND TELEPHONE NUMBER				RELATIONSHIP	AGE/DOB (if minor)
	Street address					
	City	State	Zip	Telephone no.		
	Street address					
	City	State	Zip	Telephone no.		

K 10. None of the persons named above are under any legal incapacity except

Name, incapacity, and representative of the person, if any

L 11. The individual is currently found at _____

Address or location

Telephone no.

M 12. It is necessary that a preliminary protective order be entered pending the regular hearing because

I REQUEST that the court:

N 13. Appoint _____,

Name, address, and telephone no.

who has priority as _____, as conservator of the estate to be protected.

Priority relationship

O 14. Preserve and apply the individual's property pending the appointment of a conservator as follows:

15. Enter a protective order that provides _____.

P 16. Appoint the guardian as special conservator with authority to sell or otherwise dispose of the ward's real property or
Q interest in real property.

I declare under the penalties of perjury that this petition has been examined by me and that its contents are true to the best of my information, knowledge, and belief.

R Attorney signature _____ Date _____

Attorney name (type or print) _____ Bar no. _____ Petitioner signature _____

Attorney address _____ Petitioner address _____

City, state, zip _____ Telephone no. _____ City, state, zip _____ Telephone no. _____

S 17. **NOMINATION BY PERSON TO BE PROTECTED:** I am 14 years of age or older. I nominate as my conservator

Name, address, and telephone no.

Date

Signature of person to be protected

INSTRUCTIONS FOR COMPLETING "PETITION FOR APPOINTMENT OF CONSERVATOR"

Please type or print neatly in black or blue ink. Items A through S must be read and filled in (when required) before your petition can be filed with the court. Please read the instruction for each item. Then fill in the correct information for that item on the form.

- (A)** Enter the name of the individual who you believe needs a conservator.
- (B)** Enter your name in the first line. Enter your relationship to the individual (or your interest) in the second line.
- (C)** Enter the date the individual was born, what county the individual is a resident of, the address of the place where the individual normally lives, and the county the individual's property is in.
- (D)** Check this box if there is or has been a case in the family division of the circuit court involving the individual in **(A)**. Examples of a family division case are personal protection, abuse or neglect, or a name change. If you have checked this box, enter the name of the court, the case number of the action, the name of the judge assigned to that case. Then place a check in the box indicating whether that case is still pending or not.
- (E)** Check the boxes that apply and provide the name(s) and address(es). If the individual has a power of attorney and you have a copy of the document, make a copy for the court.
- (F)** Check the boxes that you believe apply to the individual.
- (G)** Explain in as much detail as possible the specific facts about the individual's conduct or condition that lead you to believe he or she needs a conservator. Give specific examples of his or her conduct that supports what you checked in **(F)** and that demonstrate the need for a conservator. This information is extremely important for the court in making a decision about the need to appoint a conservator. If you are the guardian asking for authority to sell or otherwise dispose of your ward's real property, state the reasons why it is in the ward's best interest to do so.
- (H)** Specify the approximate value of any real property, personal property, insurance, and monthly income of the individual. An example of real property is a house. Examples of personal property are home furnishings, bank accounts, and checking accounts.
- (I)** Check whether the individual is currently receiving benefits from governmental agencies and the amount(s).
- (J)-(K)** Check all the boxes that apply and enter the names, relationships, addresses and telephone numbers of each relative of the individual. If any of the adults named in **(J)** are under legal incapacity, enter the names in **(K)**. If you check the last box in **(J)** (item 9), you must notify the Attorney General by sending a copy of this form to: Attorney General, Public Administration, PO Box 30755, Lansing, Michigan 48909.
- (L)** Enter the address and telephone number where the individual is currently located. This address and telephone number may or may not be the home of the individual. For example, if the individual is currently in the hospital, enter the name, address, and telephone number of the hospital.
- (M)** If there is an emergency that requires that a preliminary protective order be entered before the hearing, check the box and state the reason(s).
- (N)** Enter the name, address, and telephone number of the person you want to be appointed as conservator of the individual. Enter the relationship, if any, that this person has to the individual. If you are the guardian asking for authority to sell or otherwise dispose of your ward's real property, leave this blank and complete **(Q)**.
- (O)** Check this box only if you checked **(M)**.
- (P)** Check this box if you want the individual's property protected but you do not want a conservator appointed.
- (Q)** Check this box if you want the the guardian appointed special conservator to dispose of real property.
- (R)** Enter today's date, sign your name, and enter your address and telephone number.
- (S)** If the individual wants to nominate someone to be the conservator, check the box and enter the name, address, and telephone number of the person the individual is nominating. The individual must sign and date the form.

STATE OF MICHIGAN PROBATE COURT OTTAWA COUNTY CIRCUIT COURT - FAMILY DIVISION	NOTICE ON PETITION FOR CONSERVATOR OR PROTECTIVE ORDER	FILE NO.
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In the matter of _____, person to be protected

NATURE, PURPOSE, AND LEGAL EFFECT OF APPOINTMENT OF CONSERVATOR

A conservator is a person appointed by a court to help an individual manage his or her property and financial affairs when the individual is unable to manage such affairs. If a conservator is appointed for you, the conservator would make decisions for you that you now may make for yourself.

If appointed, the conservator will have all the powers over the estate and business affairs that the individual could exercise if present and not under disability, except the power to make a will.

A person has been appointed by the court to more fully explain these matters to you. That person is called a guardian ad litem. He or she will contact you to answer your questions and more fully discuss the meaning of a conservatorship.

RIGHTS

1. You have the right to secure, at your own expense, an independent evaluation of your condition.
2. You have the right to be present in person at the hearing. If you wish to be present at the hearing, all practical steps will be taken to ensure your presence, including, if necessary, moving the site of the hearing.
3. You are entitled to be represented by an attorney. The court may appoint an attorney to represent a minor, if necessary.
4. You have the right to present evidence at the hearing.
5. You have the right to cross-examine witnesses at the hearing, including a court appointed physician or mental health professional and the visitor if the court has appointed a visitor.
6. You have the right to a trial by jury.
7. You have the right to request that the hearing be closed to the public.
8. If the court determines that conservatorship is necessary, you have the right to nominate a person or corporation to be your conservator.

Do not write below this line - For court use only

**STATE OF MICHIGAN
PROBATE COURT
COUNTY OF**

NOTICE OF HEARING

FILE NO.

In the matter of _____
First, middle, and last name

TAKE NOTICE: A hearing will be held on _____ at _____ ,
Date Time

at _____ before Judge MARK A FEYEN P32369
Location Bar no.

for the following purpose(s): (state the nature of the hearing)

If you require special accommodations to use the court because of a disability, or if you require a foreign language interpreter to help you fully participate in court proceedings, please contact the court immediately to make arrangements.

Date

Attorney name Bar no.

Petitioner name

Address

Address

City, state, zip Telephone no.

City, state, zip Telephone no.

USE NOTE TO COURT: If this hearing is for a guardianship matter involving an Indian child as defined in MCR 3.002(12), you must comply with MCR 5.109(2).

USE NOTE: If this form is being filed in the circuit court family division, please enter the court name and county in the upper left-hand corner of the form.

Do not write below this line - For court use only

STATE OF MICHIGAN PROBATE COURT COUNTY OF OTTAWA	PROOF OF SERVICE	FILE NO.
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In the matter of _____

1. Titles of the papers served or mailed: PETITION FOR APPOINTMENT OF CONSERVATOR AND/OR PROTECTIVE ORDER, NOTICE OF HEARING

- ☐ 2. According to court rule, I served by ☐ first-class mail ☐ registered mail (copy of return receipt attached)
☐ certified mail (copy of return receipt attached) the papers described above on:

Name	Complete address of service	Date

- ☐ 3. According to court rule, I served by **personal service** the papers described above on:

Name	Complete address of service	Date and Time

- ☐ 4. After diligent search and inquiry, I have been unable to find and serve the following interested persons. I have served these persons by publication. Attached are copies of form PC 617.

I declare under the penalties of perjury that this proof of service has been examined by me and that its contents are true to the best of my information, knowledge, and belief.

Service fee	Miles traveled	Fee	
\$		\$	
Incorrect address fee	Miles traveled	Fee	TOTAL FEE
\$		\$	\$

Date

Signature

Name (type or print)

USE NOTE: If this form is being filed in the circuit court family division, please enter the court name and county in the upper left-hand corner of the form.

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**STATE OF MICHIGAN
PROBATE COURT
COUNTY OF OTTAWA**

ACCEPTANCE OF APPOINTMENT

FILE NO.

In the matter of _____

1. I have been appointed CONSERVATOR of the person/estate.
Type of fiduciary

2. I accept the appointment, submit to personal jurisdiction of the court, and agree to file reports and to perform all required duties.

☐ 3. For a period of _____ days from the date of my appointment, I exclude from the scope of my responsibility the
not to exceed 91 days

following real estate or ownership interest in a business entity: _____
Describe real property or business interest

because I reasonably believe the real estate or other property owned by the business entity is or may be contaminated by a hazardous substance, or is or has been used in an activity directly or indirectly involving a hazardous substance that could result in liability to the estate or otherwise impair the value of property held by the estate.

Date

Signature

Attorney name (type or print) Bar no.

Name (type or print)

Attorney address

Address

City, state, zip Telephone no.

City, state, zip Telephone no.

Date of birth

USE NOTE: If this form is being filed in the circuit court family division, please enter the court name and county in the upper left-hand corner of the form.

Do not write below this line - For court use only

**STATE OF MICHIGAN
PROBATE COURT
COUNTY OF OTTAWA**

INVENTORY (CONSERVATORSHIP)
☐ **AMENDED**

FILE NO.

USE NOTE: The conservator must serve this completed inventory on all interested persons as required by Michigan Court Rules 5.105 and 5.125. Then the conservator must complete a proof of service (form PC 564) and file it and this inventory with the court.

In the matter of _____

I, _____, am the conservator and submit the following as a complete and
Name (type or print)

accurate inventory of all the assets of the estate, including the fair market valuations as of the date of qualification as conservator. I have listed on this inventory any property the protected individual owns jointly or in common with others, including the type of ownership.

PERSONAL PROPERTY AND REAL PROPERTY DESCRIPTION If the property is owned by both the protected individual and others, specify the type of ownership in the description and check the box in the column "Total Value of Property." If the property has been used to secure a loan, show the nature and amount of the lien. Definitions and instructions for completing the inventory are on the other side.	LIEN AMOUNT	TOTAL VALUE OF PROPERTY (without reduction for lien)
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
TOTAL ASSETS		

I declare under the penalties of perjury that this inventory has been examined by me and that its contents are true to the best of my information, knowledge, and belief.

Date

Attorney signature

Signature

Attorney name (type or print) Bar no.

Name (type or print)

Address

Address

City, state, zip Telephone no.

City, state, zip Telephone no.

USE NOTE: If this form is being filed in the circuit court family division, please enter the court name and county in the upper left-hand corner of the form.

Do not write below this line - For court use only

DEFINITIONS:

- **Real property** means land, including a building or house that is built on the land.
- **Personal property** means everything that a person owns except real property. Personal property includes bank accounts and checking accounts.

INSTRUCTIONS TO COMPLETE THE INVENTORY:

1. List all real and personal property in the column **"Personal Property and Real Property Description."**
2. When listing real property, provide the legal description of the property and the name of any other owner.
 - a. If real property has been used to secure a loan (including an equity line of credit), show the nature and amount of the lien.
 - b. If the value of real property is determined by an appraisal, include the appraiser's name and address and a description of the property appraised.
 - c. Property that the protected individual owns jointly or in common with others must be listed along with the type of ownership. The court may require additional information to support the value of property that is stated in the inventory.
3. When listing personal property, provide enough detail to adequately determine the value. Some items should be listed separately and some items should be combined under one category. Provide the name and address of each financial institution listed. The address of a financial institution shall be either that of the institution's main headquarters or the branch used most frequently by the conservator.
 - a. Examples of items that should be listed and valued separately are:
 - Automobiles
 - Jewelry
 - Bank accounts
 - Antiques
 - Furniture
 - Any other individual item of high value (such as a fur coat)
 - Prepaid burial contracts
 - Life insurance (cash value)
 - Annuities
 - Mutual funds
 - Stocks and bonds
 - b. Examples of items that can be listed in categories are:
 - Household items such as dishes, flatware, curtains, linens, utensils, clothing, furnishings, etc. can be grouped into several categories or combined into one category.
 - Multiple copies or pieces of a specific item that have the same value such as stocks and bonds.
 - c. If personal property has been used to secure a loan, show the nature and amount of the lien.
 - d. If the value of personal property is determined by an appraisal, include the appraiser's name and address and a description of the property appraised.
 - e. Property that the protected individual owns jointly or in common with others must be listed along with the type of ownership. The court may require additional information to support the value of property that is stated in the inventory.

STATE OF MICHIGAN PROBATE COURT COUNTY OF OTTAWA	PROOF OF SERVICE	FILE NO.
---	-------------------------	-----------------

In the matter of _____

1. Titles of the papers served or mailed: INVENTORY (CONSERVATORSHIP)

- ☐ 2. According to court rule, I served by ☐ first-class mail ☐ registered mail (copy of return receipt attached)
☐ certified mail (copy of return receipt attached) the papers described above on:

Name	Complete address of service	Date

- ☐ 3. According to court rule, I served by **personal service** the papers described above on:

Name	Complete address of service	Date and Time

- ☐ 4. After diligent search and inquiry, I have been unable to find and serve the following interested persons. I have served these persons by publication. Attached are copies of form PC 617.

I declare under the penalties of perjury that this proof of service has been examined by me and that its contents are true to the best of my information, knowledge, and belief.

Service fee	Miles traveled	Fee	
\$		\$	
Incorrect address fee	Miles traveled	Fee	TOTAL FEE
\$		\$	\$

Date

Signature

Name (type or print)

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ACCOUNT OF FIDUCIARY SHORT FORM INSTRUCTIONS

The court will complete the top of page one with the pertinent information, if any interested party has moved since the filing of the petition you will need to reflect that on the respective line (underneath the ‘In the matter of’ line)

COLUMN 1: Income and gain in this accounting period

List here all money that **came into** the estate during the accounting period. Specifically list each source of income. If you need extra space, you can write “See attached list,” but make sure to attach a list that clearly indicates the sources and amounts of income. Typical sources of income include:

Social Security	Interest on bank accounts	Pension	Dividends from stock
Capital gains	VA benefits	Wages	Rental income
Tax refunds	SSI (Disability)	Annuities	Life insurance benefits

Make sure to record the total of all income and receipts at the bottom of the column.

COLUMN 2: Expenses, losses, and other disbursements

List here all money that was **paid out** of the estate during the accounting period. Just as with Schedule A, you should specifically list each expense, loss, or other disbursement. If you need extra space, you can write “See attached list,” but make sure to attach a list that clearly indicates the purposes and amounts of the expenses. Typical kinds of expenses include:

Personal items (clothing)	Groceries	Utilities	Medical care
Room & board in a facility	Insurance payments	Taxes	

Gifts or charitable donations, such as the protected individual might have been expected to make, may be made in conservatorships for adults as long as the estate is more than sufficient to provide for the protected individual’s needs and the annual total of such gifts does not exceed 20% of the estate income. [MCL 700.5426.]

Additionally, final accounts may include distributions to devisees, heirs, and beneficiaries.

These expenses may be listed by category. Make sure to record the total of all expenses, losses, and disbursements at the bottom of the column.

TOP OF SECOND PAGE

- 2 a: this will already be completed for you by the court (balance on hand from inventory or from your previous years accounting)
- 2 b: enter the total from column 1 on page one
- 2 c: total of 2a and 2b
- 2 d: enter the total from column 2 on page one
- 2 e: this amount should equal (exactly) the total you reflect in box 3, Itemized Assets Remaining at End of Accounting Period. If these two amount do not match the court cannot accept the account for filing and you may need to seek assistance from an attorney or an accountant.

Box 3: Itemized assets remaining at end of accounting period

List here all of the assets in the estate at the end of the accounting period. If you need extra space, you can write “See attached list,” but make sure to attach a list that clearly indicates each asset and its value. These assets and their value may be listed by category. Here’s an example:

Home at 123 Main St.	\$100,000.00
Checking Account	\$5,000.00
Stock portfolio	\$50,000.00
Personal and household property	\$2,500.00
Balance of assets remaining	\$157,500.00

For assets like the Home and Personal and household property, these should be given a value as of the Inventory or as of the date they are acquired, and that value should remain the same on each Annual Account unless that asset is sold or otherwise disposed. If an asset is sold during the accounting period, the gain or loss on that asset must be listed in Schedule C.

For assets like the Checking Account and Stock Portfolio that are on deposit with a bank or an investment firm, you must attach a copy of an account statement from that financial institution, **dated within 30 days after the end of your accounting period**. The statement must verify that the amount stated on your account is, in fact, on deposit with the financial institution.

Balance of assets remaining: You must total the value of the assets in the estate. Since this is a total of the assets on hand at the end of the accounting period, **this total must equal the Total balance of assets remaining on Line 5 of the Summary on Page 1 of the Account.**

ITEMS 3 THROUGH 7

Item 4: If any interested person has moved or died since his/her contact information was given to the court, this must be communicated to us in Item 3.

Item 5: This is only relevant for accounts filed in decedents' estates. You can ignore it.

Items 6 & 7: Statute (MCL 700.543) permits a conservator to obtain only "reasonable compensation" for services rendered. [The Mental Health Code allows for no compensation for a guardian of the estate of a person with developmental disability.] **If you charge the estate a fee for serving as a conservator, you must attach a written statement of the services performed.** It should include a description of the services, the dates those services were performed, and the amount of time spent on each service. Likewise, if any attorney fees were incurred, a written statement of the services performed must be included.

SIGNATURES

Fiduciary signature: You, as conservator (or as guardian of the estate of a person with developmental disability), must sign and date the account. If there are co-conservators (or co-guardians of the estate of a person with developmental disability), both must sign.

Attorney signature: If you have an attorney representing you in the conservatorship (or guardianship of the estate of a person with developmental disability), he or she must also sign.

****You are required to file proof (bank statements, receipts, etc.) for all expenses and remaining assets along with your annual account. There is a \$20.00 filing fee for each accounting filed.**

STATE OF MICHIGAN PROBATE COURT COUNTY OF OTTAWA	ACCOUNT OF FIDUCIARY, SHORT FORM <input type="checkbox"/> _____ Annual <input type="checkbox"/> Final <input type="checkbox"/> Interim Number <input type="checkbox"/> AMENDED	FILE NO.
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In a guardianship or conservatorship, the ward's or protected individual's current address and telephone number are:

1. I, _____, am the _____
Name Title

of the estate and submit the following as my account, which covers the period from _____
Month, day, year

to _____ (may not exceed 12 months).
Month, day, year

COLUMN 1. INCOME, GAIN, AND OTHER RECEIPTS		COLUMN 2. EXPENSES, LOSSES, AND OTHER DISBURSEMENTS	
	\$		\$
Investment gain		Investment loss	
Total Column 1 (Enter on line 2.b on page 2.)		Total Column 2 (Enter on line 2.d on page 2.)	

USE NOTE: If this form is being filed in the circuit court family division, please enter the court name and county in the upper left-hand corner of the form.

Do not write below this line - For court use only

2. a. Balance on hand from last account, or value of inventory, if first account \$ _____
- b. Enter Total Column 1, Income, Gain, and Other Receipts, from the other side of this form \$ _____
- c. **Subtotal** (Add line 2.a to line 2.b and enter the amount here.) \$ _____
- d. Enter Total Column 2, Expenses, Losses, and Other Disbursements, from the other side of this form \$ _____
- e. Balance of assets on hand (Subtract line 2.d from line 2.c and enter the amount here.) \$ _____
This line must equal the last line in item 3. (Itemize assets below.)

3. The balance of assets on hand are as follows:

ITEMIZED ASSETS REMAINING AT END OF ACCOUNTING PERIOD	
	\$
Total balance on hand. This line must equal the last line in item 2.	\$

NOTE: In guardianships and conservatorships, except as provided by MCR 5.409(C)(4), you must present to the court copies of corresponding financial institution statements or you must file with the court a verification of funds on deposit, either of which must reflect the value of all liquid assets held by a financial institution dated within 30 days after the end of the accounting period.

4. The interested persons, addresses, and their representatives are identical to those appearing on the initial application/petition, except as follows: (For each person whose address changed, list the name and new address; attach separate sheet if necessary.)

5. This account lists all income and other receipts and expenses and other disbursements that have come to my knowledge.
6. ☐ This account is not being filed with the court.
7. ☐ My fiduciary fees incurred during this accounting period (including fees that have already been approved and/or paid for this accounting period) are \$ _____. Attached is a written description of the services performed.
8. ☐ Attorney fees incurred during this accounting period (including fees that have already been approved and/or paid for this accounting period) are \$ _____. Attached is a written description of the services performed.

I declare under the penalties of perjury that this account has been examined by me and that its contents are true to the best of my information, knowledge, and belief.

Date

Attorney signature

Fiduciary signature

Attorney name (type or print) Bar no.

Fiduciary name (type or print)

Address

Address

City, state, zip Telephone no.

City, state, zip Telephone no.

(For accounts that must be filed with the court.)

NOTICE TO INTERESTED PERSONS

1. You must bring to the court's attention any objection you have to this account. Except in guardianships and conservatorships, the court does not normally review the account without an objection.
2. You have the right to review proofs of income and disbursements at a time reasonably convenient to the fiduciary and yourself.
3. You may object to all or part of an accounting by filing a written objection with the court before the court allows the account. You must pay a \$20.00 filing fee to the court when you file the objection. (See MCR 5.310[C].)
4. If an objection is filed and is not otherwise resolved, the court will conduct a hearing on the objection.
5. You must serve the objection on the fiduciary or his/her attorney.