

Instructions for Filing Annual Accountings

As of January 1, 2009

Petitions for Approval of Annual Account require the following documents:

1. The Petition for Approval of Annual Account;
2. The Accounting;
3. Financial statements for each bank account or investment account listed in the accounting;
4. A proposed form of Order that includes provisions allowing the court to set: (i) the date for the next annual review hearing to be set by the court; (ii) the date for the next annual accounting year end; and (iii) the increase or decrease of the fiduciary bond, if appropriate;
5. A current [Account Information Sheet](#);
6. A [Notice of Hearing](#); and
7. A [Proof of Notice](#)

Procedure:

The Conservator shall do the following at least 21 days before the hearing:

- a. File with the Clerk of the Court a complete accounting together with a [Notice of Hearing](#) and a Petition for Approval of Accounting. The attachments to the Petition, which consist of the accounting itself, plus the bank statements and investment statements for each account, shall be filed separately in a 9"x12" manila envelope with a [Confidential Filing Label](#) affixed to the envelope.
- b. Serve the [Notice of Hearing](#), the Petition and the Annual Accounting on the Protected Person and any interested person(s), and file a [Proof of Notice](#) with the Clerk of the Court.
- c. Lodge an Order, a copy of the Order, and a current [Account Information Sheet](#) with the Judge or Commissioner who is reviewing the Annual Accounting. Also provide a copy of the documents listed in paragraph A, above, to the Judge or Commissioner.