

Form	Filed By	Deadline	Applies To	Mailed To
Acknowledgment of Restricted Account	Financial Institution*	With deposit of funds.	Guardianships Conservatorships	Filed with court but not served.
Report on Status of the Ward	Guardian	60 days after anniversary of appointment.	Guardianships	Ward, Guardian, Conservator, Interested Persons
Inventory	Conservator*	90 days from appointment.	Guardianships Conservatorships	Ward, Guardian, Conservator, Interested Persons
Financial Accounting	Guardian to Conservator OR Conservator* to Court	60 days after anniversary of appointment.	Guardianships Conservatorships	Ward, Guardian, Conservator, Interested Persons
Notice of Right to Object	Guardian Conservator	With report on status, inventory and accounting.	Report on status, inventory and accounting	Accompanies the report on status, inventory and accounting
Notice of Hearing	Clerk	At least 10 days before the hearing.	If someone objects to the report on status, inventory and accounting	Clerk posts in 3 public places and mails to people who have requested notice. Clerk mails to ward, ward's guardian or conservator, and interested persons.
Certificate of Mailing	Guardian Conservator	Upon mailing.	Report on status, inventory, accounting, motion to terminate, and orders approving same	Filed but not served.
Certificate of Posting.	Clerk	Upon distribution of the notice.	Whenever there is a hearing	Filed but not served.

Form	Filed By	Deadline	Applies To	Mailed To
Motion to Terminate	Ward, Guardian, Conservator, Interested Persons	None.	Guardianships Conservatorships	Ward, Guardian, Conservator, Interested Persons
Order to Terminate	Judge	60 days after submission	Guardianships Conservatorships	Ward, Guardian, Conservator, Interested Persons
Motion to Change Venue	Guardian, Conservator	None.	Guardianships Conservatorships	Ward, Guardian, Conservator, Interested Persons
Order to Change Venue	Clerk	60 days after submission	Guardianships Conservatorships	Ward, Guardian, Conservator, Interested Persons
Motion to Change Reporting Period	Guardian, Conservator	None.	Guardianships Conservatorships	Ward, Guardian, Conservator, Interested Persons
Order to Change Reporting Period	Clerk	60 days after submission	Guardianships Conservatorships	Ward, Guardian, Conservator, Interested Persons

* Filed by guardian if there is not a separate conservator.

Name _____

Address _____

Phone _____

Fax _____

E-mail _____

In the _____ Judicial District Court _____ County, Utah
Court Address: _____

IN THE MATTER OF:

ACKNOWLEDGEMENT OF RESTRICTED ACCOUNT

Case Number _____

Judge _____

Being first duly sworn, I state that:

(1) I am an authorized representative of the _____.

(2) Money for this estate has been or will be deposited into an account in this institution.

(3) I acknowledge that the account is a restricted account and requires a court order for withdrawal.

Dated

Representative's Signature

NOTARY CLAUSE

Subscribed and sworn to before me this day.

Date

Notary's Signature
Seal

Name _____

Address _____

Phone _____

Fax _____

E-mail _____

I am the Guardian Conservator

I am the attorney for Guardian Conservator

My Utah State Bar number is _____

In the _____ Judicial District Court _____ County, Utah

Court Address: _____

IN THE MATTER OF:

(Ward).

REPORT ON STATUS OF THE WARD

Case Number _____

Judge _____

1. I am Guardian of the above-named Ward.

2. The Ward was born on _____ (Ward's birth date).

3. (Check all of the boxes which apply. Fill in the blanks if appropriate)

This is my first report.

My previous report covered the period from _____ to _____.

This is my final report.

4. This report covers the period from _____ to _____.

(Note: The beginning date must be one day later than the ending date of the pervious report.)

5. During the reporting period, I had contact with the Ward approximately _____ (number of) times.

6. During the reporting period, the Ward has engaged in the following education, training or social activities.

7. The Ward lives at:

Name of facility (if applicable): _____
Street Address: _____
Mailing Address: _____

8. (Check all boxes which apply. Fill in the appropriate blanks)

The Ward has been at this location since _____.
 The Ward has moved during the reporting period year because _____.

9. The Ward's living arrangement is best described as:

The Ward's home.
 A relative's home. Describe the relationship _____.
 My home.
 A care facility:

10. If the Ward is living in a private home, the following people are living in the same household with the Ward:

Name	Relationship to the Ward

11. If the Ward is living in a care facility, I would describe the care facility as follows:

The name of the care facility is: _____.

My description of the care facility is: _____

_____.

The following person at the care facility can be contacted for further information:

Name: _____.

Mailing Address: _____

City, State, Zip _____.

Phone: _____.

Email: _____.

12. I rate the living situation as:

excellent

average

below average

Explain: _____

_____.

13. I believe the Ward's feelings about the living situation are as follows:

content

unhappy

Explain: _____

_____.

14. I recommend a more suitable living arrangement.

No

Yes

Explain: _____

_____.

15. The Ward's primary medical care provider is:

Name: _____
Mailing Address: _____
City / State / Zip: _____

16. During the reporting period, the Ward has been treated or evaluated by: (Include Physicians, Dentists, Psychiatrists, Psychologists, Social workers, etc.)

Name: _____
Mailing address: _____
City / State / Zip: _____
Date: _____
Purpose: _____
Findings: _____

Name: _____
Mailing address: _____
City / State / Zip: _____
Date: _____
Purpose: _____
Findings: _____

Name: _____
Mailing address: _____
City / State / Zip: _____
Date: _____
Purpose: _____
Findings: _____

17. During the reporting period, the Ward has received the following treatment, therapy or assistive devices:

18. Currently, the Ward is taking the following medications:

Name: _____
Dosage: _____
Reason: _____

19. Describe the Ward's cognitive and emotional functioning:

20. Describe the Ward's everyday functioning, such as ability care for self, make medical decisions, and make daily living decisions:

21. During the reporting period, the Ward's mental health has:

- remained about the same
- improved
- deteriorated

Explain: _____
_____.

22. During the reporting period, the Ward's physical health has:

- remained about the same
- improved
- deteriorated

Explain: _____
_____.

23. During the reporting period, the Ward has been diagnosed with a terminal illness.

- No
- Yes

Diagnosing Doctor: _____
Telephone: _____
Diagnosis: _____

24. There is a current plan for the Ward's care, training or treatment:

- No
- Yes

- The plan is on file with the court.
- The plan is being submitted along with this Status Report.

25. I recommend that the guardianship should be

- continued
- modified as follows:

I declare under criminal penalty of Utah Code Section 46-5-101 (class B misdemeanor for knowingly making false written statement) that this document is true and correct.

Date

Sign here ► _____

(Type or Print Name Here)

Name _____

Address _____

Phone _____

Fax _____

E-mail _____

I am the Guardian Conservator

I am the attorney for Guardian Conservator

My Utah State Bar number is _____

In the _____ Judicial District Court _____ County, Utah

Court Address: _____

IN THE MATTER OF:

(Ward).

INVENTORY

Case Number _____

Judge _____

1. I am the following to the above named Ward:

- Guardian
- Conservator
- Guardian and Conservator

2. This is a complete inventory of the property owned by the Ward of which I am aware.

3. The value for each item of property is the fair market value of the property as of the date of the appointment order, which was entered on _____ (date).

4. Summary

Schedule	Property	Fair Market Value on Date of Appointment Order
A	Real Estate	
B	Stocks and Bonds	
C	Money Owed to Ward	
D	Cash and Cash Accounts	
E	Miscellaneous	
F	Debts and Encumbrances	
	Total Net Value	

Schedule A – Real Estate

Item	Description	Fair Market Value on Date of Appointment Order
1		
2		
3		
4		

I used the following method to determine the value of the real property listed above:

Property 1: _____

Property 2: _____

Property 3: _____

Property 4: _____

Schedule B – Stocks and Bonds

Item	Description	Fair Market Value on Date of Appointment Order
1		
2		
3		
4		

Schedule C – Money owed to Ward

Item	Description	Fair Market Value on Date of Appointment Order
1		
2		
3		
4		

Schedule D – Cash Accounts (Such as checking or savings accounts)

Item	Description	Fair Market Value on Date of Appointment Order
1		
2		
3		
4		

Schedule E – Other Miscellaneous Property

Item	Description	Fair Market Value on Date of Appointment Order
1		
2		
3		
4		

Schedule F – Debts and Encumbrances

Item	Description	Amount on Date of Appointment Order
1		
2		
3		
4		

I declare under criminal penalty of Utah Code Section 46-5-101 (class B misdemeanor for knowingly making false written statement) that this document is true and correct.

Date

Sign here ► _____

(Type or Print Name Here)

Name _____

Address _____

Phone _____

Fax _____

E-mail _____

I am the Guardian Conservator

I am the attorney for Guardian Conservator
My Utah State Bar number is _____

In the _____ Judicial District Court _____ County, Utah

Court Address: _____

IN THE MATTER OF:

(Ward).

**GUARDIAN'S FINANCIAL
ACCOUNTING TO CONSERVATOR
[Section 75-5-312]**

**CONSERVATOR'S FINANCIAL
ACCOUNTING TO THE COURT [SECTION
75-5-419]**

Case Number _____

Judge _____

1. I am the following to the above-named Ward:

- Guardian
- Conservator
- Guardian and Conservator

2. (Check all of the boxes which apply. Fill in the blanks if appropriate.)

- This is my first report.
- My previous report covered the period from _____ to _____.
- This is my final report.

3. This accounting covers the period from _____ to _____.

4. There is an estate plan to guide investment and distribution:

- No
- Yes

- The plan is on file with the court.
- The plan is being submitted along with this accounting.

5. Balance Summary (Beginning Balance must agree with Ending Balance of the Inventory or the previous accounting, whichever is later.)

Item	Property Type	Beginning Balance	Gains and Losses	Ending Balance
1	Real Estate			
2	Stocks and Bonds			
3	Money Owed to Ward			
4	Cash and Cash Accounts			
5	Miscellaneous Property			
6	Debts and Encumbrances			
	Total			**

**The total for Ending Balance must equal the total below for Receipts and Payments.

Summary of Receipts and Payments

1	Receipts Total	
2	Payments Total	
3	Total	

Receipts during the reporting period

Item	Property Description	Amount
1	Wages	
2	Interest	
3	Dividends	
4	Social Security	
5	Annuities	
6	Insurance	
7	Other (Describe)	
	Total	

Payments during the reporting period

Item	Category	(Amount)
1	Mortgage/Rent	
2	Utilities (gas, electricity, water, sewage, phone, internet, etc.)	
3	Home Maintenance (Include maintenance, cleaning, repairs, etc.)	
4	Home Improvement (Include additions, remodeling, etc.)	
5	Home Furnishings	
6	Health Care (physicians, dentists, psychiatrists, psychologists, etc.)	
7	Food	
8	Education	
9	Clothes	
10	Personal Effects	
11	Activities	
12	Transportation	
13	Taxes	
14	Charge for Conservator's Services	
15	Charge for Guardian's Services	
16	Charge for other Professional Services	
17	Court Fees	
18	Other (Describe)	
	Total	

Schedule A – Real Estate

Item	Description	Fair Market Value on Date of Appointment Order
1		
2		
3		
4		

I used the following method to determine the value of the real property listed above:

Property 1: _____

Property 2: _____

Property 3: _____

Property 4: _____

Schedule B – Stocks and Bonds

Item	Description	Fair Market Value on Date of Appointment Order
1		
2		
3		
4		

Schedule C – Money owed to Ward

Item	Description	Fair Market Value on Date of Appointment Order
1		
2		
3		
4		

Schedule D – Cash Accounts (Such as checking or savings accounts)

Item	Description	Fair Market Value on Date of Appointment Order
1		
2		
3		
4		

Schedule E – Other Miscellaneous Property

Item	Description	Fair Market Value on Date of Appointment Order
1		
2		
3		
4		

Schedule F – Debts and Encumbrances

Item	Description	Amount on Date of Appointment Order
1		
2		
3		
4		

I declare under criminal penalty of Utah Code Section 46-5-101 (class B misdemeanor for knowingly making false written statement) that this document is true and correct.

_____ Sign here ► _____
Date

(Type or Print Name Here)

Name _____

Address _____

Phone _____

Fax _____

E-mail _____

I am the Guardian Conservator

I am the attorney for Guardian Conservator
My Utah State Bar number is _____

In the _____ Judicial District Court _____ County, Utah

Court Address: _____

IN THE MATTER OF:

(Ward).

NOTICE OF RIGHT TO OBJECT

Case Number _____

Judge _____

1. To _____ (name), a person interested in the Ward.
2. You may object to all or part of the documents listed below by filing your objection with the court. The court must receive your objection no later than 30 days from the date this notice was mailed.
3. The objection must specify the entries to which you object and the reasons for your objection. If you file an objection, the court will schedule a hearing of which you will be notified.

4. I have filed the documents marked below with the court and have attached copies of these documents to this Notice for you to review. If after reviewing them you don't agree with something, you may file a written objection with the court as explained above.

- Acknowledgement of Restricted Account
- Report on Status of the Ward
- Inventory (Utah Code Section 75-5-418)
- Guardian's Financial Accounting to the Conservator (Utah Code Section 75-5-312)
- Conservator's Financial Accounting to the Court (Utah Code Section 75-5-419)
- Notice of Right to Object
- Certificate of Posting and Mailing the Notice of Hearing
- Certificate of Mailing
- Motion to Terminate the Guardianship and/or Conservatorship
- Order to Terminate the Guardianship and/or Conservatorship
- Motion to Change Venue
- Order to Change Venue
- Motion to Change Reporting Period
- Order to Change Reporting Period
- _____
- _____
- _____

I declare under criminal penalty of Utah Code Section 46-5-101 (class B misdemeanor for knowingly making false written statement) that this document is true and correct.

Date

Sign here ► _____

(Type or Print Name Here)

Name _____

Address _____

Phone _____

Fax _____

E-mail _____

I am the Guardian Conservator

I am the attorney for Guardian Conservator
My Utah State Bar number is _____

In the _____ Judicial District Court _____ County, Utah

Court Address: _____

IN THE MATTER OF:

(Ward).

CERTIFICATE OF MAILING

Case Number _____

Judge _____

1. I certify that on _____ (date), I mailed the documents checked below, along with the Notice of Right to Object, by first class mail to the last known address of the following:

- the Ward
- the Ward's Guardian
- the Ward's Conservator
- the Ward's heirs
- anyone who has requested notice under Utah Code Section 75-5-406.

2. The following documents were mailed:

- Acknowledgement of Restricted Account
- Report on Status of the Ward
- Inventory (Utah Code Section 75-5-418)
- Guardian's Financial Accounting to the Conservator (Utah Code Section 75-5-312)
- Conservator's Financial Accounting to the Court (Utah Code Section 75-5-419)
- Notice of Right to Object
- Certificate of Posting and Mailing the Notice of Hearing
- Certificate of Mailing
- Motion to Terminate the Guardianship and/or Conservatorship
- Order to Terminate the Guardianship and/or Conservatorship
- Motion to Change Venue
- Order to Change Venue
- Motion to Change Reporting Period
- Order to Change Reporting Period
- _____
- _____
- _____
- _____

I declare under criminal penalty of Utah Code Section 46-5-101 (class B misdemeanor for knowingly making false written statement) that this document is true and correct.

Sign here ► _____

Date

(Type or Print Name Here)

In the _____ Judicial District Court _____ County, Utah

Court Address: _____

IN THE MATTER OF:

(Ward).

NOTICE OF HEARING

Case Number _____

Judge _____

To the Ward, Guardian of the Ward, Conservator of the Ward, and all people interested in the Ward or in the estate of the Ward:

1. This court will hold a hearing in this matter as follows:

Date: _____

Time: _____

Address: _____

Courtroom Number: _____

2. You have the right to attend the hearing and, within the rules of evidence, to be heard.

3. The purpose of this hearing is to consider the documents checked below:

Acknowledgement of Restricted Account

Report on Status of the Ward

Inventory (Utah Code Section 75-5-418)

Guardian's Financial Accounting to the Conservator (Utah Code Section 75-5-312)

Conservator's Financial Accounting to the Court (Utah Code Section 75-5-419)

Notice of Right to Object

- Certificate of Posting and Mailing the Notice of Hearing
- Certificate of Mailing
- Motion to Terminate the Guardianship and/or Conservatorship
- Order to Terminate the Guardianship and/or Conservatorship
- Motion to Change Venue
- Order to Change Venue
- Motion to Change Reporting Period
- Order to Change Reporting Period
- _____
- _____
- _____
- _____

Date

Court Clerk's Signature

In the _____ Judicial District Court _____ County, Utah

Court Address: _____

IN THE MATTER OF:

(Ward).

CERTIFICATE OF POSTING

Case Number _____

Judge _____

1. I certify that on _____ (date), which is at least 10 days before the hearing scheduled in this case, I posted notice of the date, time and place of this hearing in a public place in this courthouse and in the following two other public places:

Name	Address	City

2. I certify that on _____ (date), which is at least 10 days before the hearing scheduled in this case, I mailed notice of the date, time and place of this hearing by first class mail to the last known address of:

the Ward

the Ward's Guardian

the Ward's Conservator

the Ward's heirs

anyone who has requested notice under Utah Code Section 75-5-406

The notice was mailed as follows:

Name	Address	City	State	Zip

Date

Court Clerk's Signature

Name _____

Address _____

Phone _____

Fax _____

E-mail _____

I am the Guardian Conservator

I am the attorney for Guardian Conservator
My Utah State Bar number is _____

In the _____ Judicial District Court _____ County, Utah

Court Address: _____

IN THE MATTER OF:

(Ward).

MOTION TO TERMINATE:

GUARDIANSHIP

CONSERVATORSHIP

GUARDIANSHIP AND CONSERVATORSHIP

Case Number _____

Judge _____

1. I am the:

Guardian

Conservator

Guardian and Conservator

2. I move for an order of the court terminating the:

- Guardianship
- Conservatorship
- Guardianship and Conservatorship

3. The reason I move for this termination is:

- the Ward has been adopted.
- the Ward is no longer incapacitated.
- the Ward has died.
- for the following reasons:

4. I have attached my final accounting for my Ward's estate to this motion.

5. I request that the court enter an order transferring title of the Ward's estate to the:

- Ward.
- Personal Representative of the Ward.
- successor in interest.

I declare under criminal penalty of Utah Code Section 46-5-101 (class B misdemeanor for knowingly making false written statement) that this document is true and correct.

Date

Sign here ► _____

(Type or Print Name Here)

In the _____ Judicial District Court _____ County, Utah

Court Address: _____

IN THE MATTER OF:

(Ward).

ORDER TO TERMINATE:

GUARDIANSHIP

CONSERVATORSHIP

**GUARDIANSHIP AND
CONSERVATORSHIP**

Case Number _____

Judge _____

1. The following person filed a Motion to Terminate along with a final accounting of the Ward's estate. This person also filed a certificate showing that copies of the motion were mailed in compliance with the requirements of Rule 6-501 of the Utah Code of Judicial Administration.

- Guardian
- Conservator
- Guardian and Conservator

2. The motion asks that the following be terminated:

- Guardianship
- Conservatorship
- Guardianship and Conservatorship

3. The court clerk has filed a certificate showing that the clerk has posted a copy of the notice of the hearing for at least ten consecutive days immediately preceding the time set for the hearing in at least three public places in the county, one of which is this courthouse.

4. The court clerk has filed a certificate showing that the clerk has mailed a copy of the notice of the hearing at least ten days before the time set for the hearing by first class mail addressed to the address given by the person requesting notice under Utah Code Section 75-5-406.

5. The court heard and considered the evidence, and

- there were no objections.
- the court heard the objections filed.

6. The court terminates the

- Guardianship.
- Conservatorship.
- Guardianship and Conservatorship.

7. The reason for termination is:

- the Ward has been adopted.
- the Ward is no longer incapacitated.
- the Ward has died.
- for the following reasons:

8. The Ward's estate shall be transferred to the:

- Ward.
- Personal Representative of the Ward.
- successor in interest.
- Other: _____

Date

Judge's Signature

Name _____

Address _____

Phone _____

Fax _____

E-mail _____

I am the Guardian Conservator

I am the attorney for Guardian Conservator
My Utah State Bar number is _____

In the _____ Judicial District Court _____ County, Utah

Court Address: _____

IN THE MATTER OF:

(Ward).

MOTION TO CHANGE VENUE

Case Number _____

Judge _____

1. I am the:

- Guardian
- Conservator
- Guardian and Conservator

2. I move to change venue to the following court (new court):

(Find the court address on the court's website at: www.utcourts.gov)

3. The reason I want to change venue is because the Ward is living in the following county where the new court is located.

(County where Ward is living)

4. The Ward's current address is:

(Ward's Address)

5. The new court is a District Court in the county where the Ward is living and under Utah Code Section 75-5-313 and Rule 6-501 of the Utah Code of Judicial Administration, has concurrent jurisdiction to receive the required annual reports in this matter. I ask that I be allowed to file in that court. I further ask that any future court proceedings related to this case be held in that court.

I declare under criminal penalty of Utah Code Section 46-5-101 (class B misdemeanor for knowingly making false written statement) that this document is true and correct.

Date

Sign here ►

(Type or Print Name Here)

In the _____ Judicial District Court _____ County, Utah

Court Address: _____

IN THE MATTER OF:

(Ward).

ORDER ON MOTION TO CHANGE VENUE

Case Number _____

Judge _____

1. The following person filed a motion asking that venue be changed to a District Court (new court) in the county where the Ward is living. This person also filed a certificate showing that copies of the motion were mailed in compliance with the requirements of Rule 6-501 of the Utah Code of Judicial Administration.

- Guardian
- Conservator
- Guardian and Conservator

2. The Ward's current address is:

(Ward's Address)

3. The court finds that the Ward is living in the following county:

(County where Ward is living)

4. The court clerk has filed a certificate showing that the clerk has posted a copy of the notice of the hearing for at least ten consecutive days immediately preceding the time set for the hearing in at least three public places in the county, one of which is this courthouse.

5. The court clerk has filed a certificate showing that the clerk has mailed a copy of the notice of the hearing at least ten days before the time set for the hearing by first class mail addressed to the address given by the person requesting notice under Utah Code Section 75-5-406.

6. The court heard and considered the evidence, and

- there were no objections.
- the court heard the objections filed.

7. The court rules as follows:

The court grants the Motion to Change Venue for the following reason:

- The Ward is living in the county where the new District Court is located.
- Other: _____.

The court denies the Motion to Change Venue for the following reason:

- The Ward is not living in the county where the new District court is located.
- Other: _____.

8. The court orders that all future proceedings in this matter, including the filing of guardian and conservator reports, will be in the following District Court:

Date

Judge's Signature

Name _____

Address _____

Phone _____

Fax _____

E-mail _____

I am the Guardian Conservator

I am the attorney for Guardian Conservator
My Utah State Bar number is _____

In the _____ Judicial District Court _____ County, Utah

Court Address: _____

IN THE MATTER OF:

(Ward).

MOTION TO CHANGE REPORTING PERIODS

Case Number _____

Judge _____

1. I was appointed on _____ (date).

2. I am asking that my annual reporting period be changed to:

Begin date _____ (mm/dd/yyyy)

End date _____ (mm/dd/yyyy).

3. I want to change the dates of my annual reporting period for the following reasons:

In the _____ Judicial District Court _____ County, Utah

Court Address: _____

IN THE MATTER OF:

(Ward).

**ORDER ON MOTION TO CHANGE
REPORTING PERIODS**

Case Number _____

Judge _____

1. The following person filed a motion asking that the dates for this person's reporting periods be changed. This person also filed a certificate showing that copies of the motion were mailed in compliance with the requirements of Rule 6-501 of the Utah Code of Judicial Administration.

- Guardian
- Conservator
- Guardian and Conservator

2. The court clerk has filed a certificate showing that the clerk has posted a copy of the notice of the hearing for at least ten consecutive days immediately preceding the time set for the hearing in at least three public places in the county, one of which is this courthouse.

3. The court clerk has filed a certificate showing that the clerk has mailed a copy of the notice of the hearing at least ten days before the time set for the hearing by first class mail addressed to the address given by the person requesting notice under Utah Code Section 75-5-406.

4. The court heard and considered the evidence, and

- there were no objections.
- the court heard the objections filed.

5. The court rules as follows:

- The court grants the Motion to Change Reporting Periods.
- The court denies the Motion to Change Reporting Periods.

Reason: _____

6. The court orders that the annual Reporting Periods for the following person are to be as follows:

- Guardian
- Conservator
- Guardian and Conservator

Begin date for Reporting Period _____.

End date for Reporting Period: _____.

Date

Judge's Signature