

Checklist for Accounting of Minor's Estate and Schedules

- You must complete a form before you file it. These instructions will help you complete the forms.
- If you still have difficulty after reading these instructions, contact the Self Help Center. See <http://www.utcourts.gov/selfhelp/contact/>.
- The judicial services representative cannot complete a form for you.
 - Attach a copy of any document referred to in the form.
 - Keep a copy of all documents for your records.
 - Attend all court hearings.
 - Some forms may not apply in your case.
 - Check with your court about local requirements.

(1) Accounting of Minor's Estate

- Print your name and contact information at the top of the first page. Check whether you are the guardian or conservator or the attorney for the guardian or conservator.
- Print the county name and the court address in the blank lines.
- Complete the heading exactly as it appears in the petition.
- Reporting period. On the first line, print the date of the inventory or the date of the last accounting, whichever is later. On the second line, print the end date of this accounting. Check the box if the guardianship or conservatorship has ended and this is your final accounting.
- Paragraph (1) Income: Print the minor's annual pre-tax income in the appropriate boxes. Add them up and print the total.
- Paragraph (2) Expenses: Print the minor's annual expenses in the appropriate boxes. Add them up and print the total.
- Paragraph (3) Financial assets: Print the name and address of the bank, credit union or other financial institution that has the minor's savings account or checking account. Print the names of the account owners (person's authorized to make deposits and withdrawals.) Print the current balance of each account. Add them up and print the total. If the minor has financial assets other than a savings or checking account, complete Schedule A and file it with this Accounting form. Print the total from Schedule A on the line in Paragraph (3).
- Paragraph (4) Personal property: Print the estimated value of the items listed. Add them up and print the total. If the minor has personal property other than the

items listed, complete Schedule B and file it with this Accounting form. Print the total from Schedule B on the line in Paragraph (4).

- Paragraph (5) Real property: If the minor owns real property, complete Schedule C and file it with this Accounting form.
- Paragraph (6) Business interests: If the minor owns business interests, complete Schedule D and file it with this form.
- Paragraph (7) Debts owed by the minor: If the minor owes debts, complete Schedule E and file it with this form. Print the totals from Schedule E on the lines in Paragraph (7).
- Paragraph (8) Credit cards owned by the minor: If the minor owns credit cards, complete Schedule F and file it with this form. Print the totals from Schedule F on the lines in Paragraph (8).
- Paragraph (9) Changes from last report: Describe any changes between this report and the inventory or previous accounting, whichever is later. If there have been no changes, print "no changes." The form lists several examples, but you may have changes not listed. Describe them. The court is interested in making sure that you are managing the minor's estate in a way that benefits the minor.
- Attach any required documents and forms.
- Date and sign the Accounting.
- Complete the certificate of service.
- Serve the Accounting and any schedules on the interested persons by one of the methods described in the certificate of service. [URCP 5](#) governs service.
- File the original Accounting, schedules and other documents and the certificate of service with the judicial services representative.

(2) Schedule A. Financial Assets

- Complete this form only if the minor has financial assets other than a savings or checking account.
- Print your name and contact information at the top of the first page. Check whether you are the guardian or conservator or the attorney for the guardian or conservator.
- Print the county name and the court address in the blank lines.
- Complete the heading exactly as it appears in the petition.
- For each of the assets that the minor owns, print the name and address of the bank, credit union or other financial institution that has the account. Print the names of the account owners. Print the current balance of each account. Add them up and print the total.

- Print the total amount from the Schedule on the line in Paragraph (3) of the Accounting.
- Date and sign the form.
- Attach the form to the Accounting.

(3) Schedule B. Personal Property

- Complete this form only if the minor has personal property other than the items listed on the Accounting form.
- Print your name and contact information at the top of the first page. Check whether you are the guardian or conservator or the attorney for the guardian or conservator.
- Print the county name and the court address in the blank lines.
- Complete the heading exactly as it appears in the petition.
- For each of the items that the minor owns, print the estimated value. Add them up and print the total.
- Print the total amount from the Schedule on the line in Paragraph (4) of the Accounting.
- Date and sign the form.
- Attach the form to the Accounting.

(4) Schedule C. Real Property

- Complete this form only if the minor owns real property.
- Print your name and contact information at the top of the first page. Check whether you are the guardian or conservator or the attorney for the guardian or conservator.
- Print the county name and the court address in the blank lines.
- Complete the heading exactly as it appears in the petition.
- Print the required information for any real property owned by the minor. Attach a copy of the most recent tax assessment.
- Date and sign the form.
- Attach the form to the Accounting.

(5) Schedule D. Business Interests.

- Complete this form only if the minor owns business interests.

- Print your name and contact information at the top of the first page. Check whether you are the guardian or conservator or the attorney for the guardian or conservator.
- Print the county name and the court address in the blank lines.
- Complete the heading exactly as it appears in the petition.
- Print the required information for any business interests owned by the minor.
- Date and sign the form.
- Attach the form to the Accounting.

(6) Schedule E. Debts

- Complete this form only if the minor owes money to someone else.
- Print your name and contact information at the top of the first page. Check whether you are the guardian or conservator or the attorney for the guardian or conservator.
- Print the county name and the court address in the blank lines.
- Complete the heading exactly as it appears in the petition.
- Print the name and address of the creditor and the purpose of the debt. For each creditor listed, print the amount owed and the amount of the monthly payments. Add them up and print the totals.
- Print the total amounts from the Schedule on the lines in Paragraph (7) of the Accounting.
- Date and sign the form.
- Attach the form to the Accounting.

(7) Schedule F. Credit Cards

- Complete this form only if the minor owns credit cards.
- Print your name and contact information at the top of the first page. Check whether you are the guardian or conservator or the attorney for the guardian or conservator.
- Print the county name and the court address in the blank lines.
- Complete the heading exactly as it appears in the petition.
- Print the names of the cards owned by the minor and the bank, credit union or other financial institution that issued them. For each card listed, print the credit limit on the card and the remaining credit available. Add them up and print the totals.

- Print the total amounts from the Schedule on the lines in Paragraph (8) of the Accounting.
- Date and sign the form.
- Attach the form to the Accounting.

(8) Notice of Right to Object

- You must serve the Notice of the Right to Object with the Accounting. [CJA 6-501](#).
- Print the county name and the court address in the blank lines.
- Complete the heading exactly as it appears in the petition.
- Print the name and address of the person to whom the notice is being given.
- Date and sign the form.
- Attach the form to the Accounting.