

## Private Information Record in Guardianship and Conservatorship cases

Utah Rule of Judicial Administration 6-501 provides that anyone who has been appointed as a guardian or conservator must file this completed and verified form with the court within 7 days after the court enters the order of appointment. Additionally, you must keep the court informed of your current address and phone number and the protected person's. You may notify the court by calling \_\_\_\_\_. Please have your case number ready. Or you can print the information in the space below and mail it to the court at \_\_\_\_\_.

\_\_\_\_\_ Case Number

### Information About Guardian/Conservator

### Information About Protected Person

\_\_\_\_\_ Name

\_\_\_\_\_ Name

\_\_\_\_\_ Address

\_\_\_\_\_ Address

\_\_\_\_\_ City, State, Zip

\_\_\_\_\_ City, State, Zip

\_\_\_\_\_ Phone

\_\_\_\_\_ Phone

\_\_\_\_\_ Email

\_\_\_\_\_ Email

\_\_\_\_\_ Social Security Number

\_\_\_\_\_ Social Security Number

\_\_\_\_\_ Date of Birth

\_\_\_\_\_ Date of Birth

\_\_\_\_\_ Driver License Number

\_\_\_\_\_ Driver License Number

\_\_\_\_\_ Please list your next-of-kin or other contact person who will know how to reach you.

\_\_\_\_\_ Contact Person's Name

\_\_\_\_\_ Address

\_\_\_\_\_ City, State, Zip

\_\_\_\_\_ Phone

\_\_\_\_\_ Email

\_\_\_\_\_ If the Protected Persons include school age children, please list the school they will be attending.

Child's Name	School Name	Child's Name	School Name

\_\_\_\_\_ I declare under penalty of Utah Code Section 78B-5-705 that everything stated in this document is true.

Date \_\_\_\_\_ Sign here ► \_\_\_\_\_

## Summary of What is Expected of Guardians and Conservators

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This summary is only a summary. For more information about your responsibilities and forms, please visit the court's website at <http://www.utcourts.gov/howto/family/gc/>.

### (1) Duties to the Court

#### (a) What you must do:

- Notify the court if you or the protected person move.
- File a "status report" every year within 60 days after the anniversary of your appointment. (guardian only)
- File a financial accounting every year within 60 days after the anniversary of your appointment.
- File an inventory of the estate within 90 days after your appointment.
- File a final accounting when the guardianship or conservatorship ends.
- Notify the court if the protected person dies or no longer needs a guardian or conservator.

### (2) Duties to the Protected Person

#### (a) What you must do:

- Make the decisions that the protected person would make, unless that decision would cause harm.

#### (b) What you must not do:

- Mix your personal or business money and property with the protected person's money and property.
- Use the protected person's money or property for the benefit of anyone other than the protected person.
- Abuse, neglect or isolate the protected person.

#### (c) What the guardian may do (unless the court's order limits your authority):

- Make decisions for the protected person about:
  - health care or other service;

- custody and residence;
- care, comfort, and maintenance;
- training and education; and
- clothing, furniture, vehicles and personal effects.

#### (d) What the conservator — or guardian if there is no conservator — must do:

- Identify, locate and control the protected person's estate.
- Collect money owed to the protected person, including income and benefits, and start legal proceedings if needed.
- Manage the protected person's estate to so that needs are met throughout his or her expected life.
- Pay taxes, expenses and debts owed by the protected person.

#### (e) What the conservator may do:

- Make the gifts and donations that the protected person would make.
- Invest the protected person's money and property.

### (3) Duties to Interested Persons

#### (a) What you must do:

- Notify the interested persons of your appointment right away; notify others as needed.
- Notify the interested persons if the protected person dies or no longer needs a guardian or conservator.