

COMPLETING THE ANNUAL ACCOUNTING

Use this form to provide a line-by-line explanation of what has been received and what has been spent out of each of the ward's/minor ward's/protected person's accounts.

Only use this individual form if you did not use the form included in your annual packet.

Choose the county
using the
drop-down list.

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Enter the name of the ward, minor ward, or protected person.

Enter the case
number.

Enter the name of the bank, the last four digits of the account number, the starting date, and the ending date of the details for this account.

DO NOT ENTER THE WHOLE ACCOUNT NUMBER.

Enter the beginning balance on the starting date of this accounting.

Use these lines to enter the details for **all** activity in the account. Enter the date, the check number (if any), who it was paid to or received from, the reason for the transaction, the amount received, or the amount paid. If this is being done on the computer, the balance will calculate on its own.

To add a page for more entries on this account, use this button.

To add a page for another account, use this button.

[illegible]

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I swear or affirm, under the penalties of perjury, that I have examined the Annual Accounting and, to the best of my knowledge and belief, it is true, correct, and complete.

Signature: _____ Date: _____

Printed Name: _____

(of guardian and/or conservator)

Street Address/P.O. Box: _____

City/State/ZIP Code: _____

Telephone Number: _____

Email address: _____

If completed by an attorney:

Bar Number: _____

Is there more than one guardian and/or conservator? yes ☒ no ☐

Signature: _____ Date: _____

Printed Name: _____

(of co-guardian and/or co-conservator)

Street Address/P.O. Box: _____

City/State/ZIP Code: _____

Telephone Number: _____

Email address: _____

If completed by an attorney:

Bar Number: _____

Sign the form, and enter your printed name, the date signed, your address, telephone number, and your email address.

If completed by an attorney, enter your Bar Number.

If there is a co-guardian or co-conservator, they will sign the form, and enter their printed name, the date signed, their address, telephone number, and email address.

Check the box if there is a co-guardian or co-conservator. If "yes" is checked, the second signature block appears.