

**QUICK REFERENCE FOR
GUARDIANS/CONSERVATORS**

In the Matter of _____, ward/minor ward/protected person.

County: _____ Case number: _____

The anniversary date of your appointment is: _____
(one year after Order of Appointment is filed.)

Date your Letters were issued: _____

If you were appointed as:	For an <u>Adult</u> – Your reporting packet is:	For a <u>Minor</u> – Your reporting packet is:
Guardian	A	MA
Guardian with a Budget	B	MB
Conservator: with or without Restricted Accounts	C	C
Guardian and Conservator	D	MD
Guardian w/No Authority Over the Estate of the Ward	E	ME

Below is a list of duties that need to be completed within the time lines noted:

Requirement:	Additional information:	Due by:
Financial Institution Receipt of Letters (CC 16:2.6.1) NOTE: this is not required for Guardians w/No Authority Over the Estate of the Ward.	To show the court you gave copies of your Letters to all financial institutions where the ward/minor ward/protected person has accounts. (Neb. Ct. R. § 6-1443(B))	Within 30 days after your Letters are issued: _____
File Letters with the Register of Deeds	In any county where the ward/minor ward/protected person has an interest in real property, wherever located. (Neb. Ct. R. § 6-1443(F))	Within a reasonable time: _____
Complete Training for Guardians and Conservators and file the certificate of completion.	Providers and class dates and locations are listed on the Supreme Court Website http://supremecourt.nebraska.gov/programs-services/office-public-guardian/training-dates-locations . (Neb. Rev. Stat. § 30-2627(d))	Within 90 days of Order of Appointment: _____
File your Annual Report: _____ The annual reports must be sent to all interested persons who have not completed the Waiver of Notice form. A Certificate of Mailing must be filed with the court, indicating you mailed the completed forms to all interested persons by first class mail, postage pre-paid. You will receive a notice from the court 45 days before the due date as a reminder. Bank and/or brokerage statements are not sent to interested persons unless the court has ordered them to be sent.	Packet to be filed will include: ____ Annual Report of Guardian on Condition of Ward/ Guardian for a Minor ____ Updated Inventory ____ Annual Accounting ____ Bank and/or Brokerage Statements for the entire reporting period. ____ Bank and/or Brokerage Statement for the <u>last month</u> of the reporting period. ____ Budget Report ____ Notice of Right to Object. ____ Certificate of Mailing (Neb. Ct. R. § 6-1442(B))	No later than one year and 30 days from the date the Order of Appointment was filed: _____

Helpful Reminders:

- On all Bank statements and brokerage reports, black out any personal information (Social Security number, date of birth, account numbers, etc.).
- Please note: There is a court filing fee due with the annual reports. The fee is \$5 for the Annual Accounting and \$5 for the Report on Condition of Ward. Each of the form(s) you need are included in your packet.
- You may find the forms online at <https://supremecourt.nebraska.gov/programs-services/guardianship-conservatorship#forms> or you can make copies before using the original so that you will have them for future use.
- NEVER co-mingle the money of the ward/minor ward/protected person with your personal accounts. If necessary, open new accounts immediately.
- Except as provided in § 6-1437, you shall not pay yourself any money from the ward's/minor ward's/protected person's accounts without first receiving permission from the court. This includes any money for living expenses, if the ward/minor ward/protected person lives with you.
- You shall not make any cash withdrawals or receive cash back on a transaction from any account without a court order. If an account is restricted, you cannot access that money without a court order.
- You must notify the court within 10 days if either you or your ward/minor ward/protected person has a change of address.
- You must notify the court within 10 days if the ward/minor ward/protected person dies.
- You must get court approval **prior** to moving the ward/minor ward/protected person out of the State of Nebraska.
- You must file your Letters with the Register of Deeds in any county the ward/minor ward/protected person has real property or an interest in real property wherever located within a reasonable time.
- If you fail to file any of the reports above on time, you will receive an Order to Show Cause requiring you to appear in court to explain why the report(s) were not filed.