

ACCEPTANCE OF APPOINTMENT OF CONSERVATOR – RESTRICTED

REQUIRED

Neb. Ct. R. § 6-1443(A)

IN THE COUNTY COURT OF _____ COUNTY, NEBRASKA

IN THE MATTER OF

Case # _____

Protected Person

ACCEPTANCE OF APPOINTMENT OF CONSERVATOR – RESTRICTED

I, _____, accept appointment as conservator of the assets of
Name of conservator(s) _____, a protected person, and swear that I will perform,
Name of protected person _____

according to law, all duties as conservator. I acknowledge my responsibilities as conservator by **initialing** all of the following:

Acknowledgments before Letters are issued to establish my authority to serve as conservator:

_____ I shall file with the Court the Guardian/Conservator General Information form (CC 16:2.4) and an Address Information for Guardianships/Conservatorships form (CC 16:2.5).

_____ If funds are restricted by court order, within ten days of my appointment I shall file with the court a Proof of Restricted Account form (CC 16:2.11) and an updated Personal and Financial Information for Guardianships and Conservatorships form (CC 16:2.23) with full account numbers.

_____ Within 30 days of appointment I shall file with the court an Acknowledgment of Financial Institution form (CC 16:2.6) showing that I gave copies of the order appointing me conservator, to all financial institutions where the protected person has accounts. I shall also file an updated Personal and Financial Information for Guardianships and Conservatorships form (CC 16:2.23) with full account numbers and printouts of all assets and account numbers.

_____ Within 30 days of my appointment, I shall file with the court an Inventory, Affidavit of Due Diligence, and Certificate of Mailing form (CC 16:2.9) of the protected person's assets.

_____ If the court requires a bond, I shall file proof of that bond with the court.

Acknowledgments after Letters are issued:

_____ I shall file with the court an Acknowledgment of Financial Institution form (CC 16:2.6) showing that I gave a copy of my Letters to all financial institutions where the protected person has

accounts. I shall also file a (confidential) Personal and Financial Information for Guardianships and Conservatorships form (CC 16:2.23) with full account numbers and printouts of all assets and account numbers.

_____ Within 90 days of my appointment I shall complete a guardianship/conservatorship training class and file proof of completion with the court.

_____ I shall file my letters of Conservatorship with the Register of Deeds in any county where the protected person has real property or an interest in real property.

_____ One year after my appointment and every year thereafter, I shall file with the court:

1. Updated Inventory form (CC16:2.45)
2. Annual Accounting form (CC 16:2.44).
3. Certificate of Proof of Possession (CC16:2.13). If any funds are restricted, the bank or depository must indicate a restriction to the account on the certificate: "No withdrawals without court order."
4. Copies of all bank statements and/or brokerage statements for the dates covered by the accounting. If full account numbers, social security numbers, dates of birth or other personal information appear on the bank statements and/or brokerage statements, I shall black out all but the last four digits before sending them to the interested persons.
5. Personal and Financial Information for Guardianships and Conservatorships form (CC 16:2.23) showing complete account numbers of accounts, etc. listed on inventory and certificate of proof of possession. This form contains confidential information and is not shared with the parties except by court order.

_____ I acknowledge all of the above documents (except the confidential Personal and Financial Information for Guardianships and Conservatorships form) shall be sent to all interested persons along with Notice of Right to Object Form (CC 16:2.16).

_____ I acknowledge that I shall file with the court a Certificate of Mailing (CC 16:2.24) showing I mailed all of the above documents to all interested persons by first class mail, postage pre-paid.

_____ I shall notify the court of the change of address of the protected person within three days of the change.

_____ I shall not move the protected person to a location outside of the State of Nebraska without court permission.

_____ I shall notify the court of the protected person's death within three days.

_____ I shall file with the court a Notice of Newly Discovered Assets form, (CC 16:2.18) within 30 days after I become aware of any additional assets, gifts, awards, settlements or inheritances over \$500.00 not disclosed in the most current inventory.

_____ I shall not make any ATM withdrawals and/or get cash back from a debit transaction without a court order.

_____ I have reviewed the above requirements with my attorney (*if I have one*) and I have received all forms necessary to comply with the above and I have no further questions of my attorney. (*If you do not have an attorney please indicate "not applicable" and go to next acknowledgment.*)

_____ I have received the forms needed to comply with the above requirements. (*If you do not have an attorney, you may get the forms from the clerk's office or on the Nebraska Supreme Court website, <http://supremecourt.ne.gov/forms/county/guardian-conservators.shtml>.*)

Signature(s) of Conservator(s)

Date _____

Print or Type Name of Conservator(s)

Bar Number and Firm Name (attorneys only)

Street Address/P.O. Box of Conservator(s)

City/State/ZIP Code of Conservator(s)

Phone of Conservator(s)

E-mail Address of Conservator(s)