

INITIAL DOCUMENT REVIEW WORKSHEET

IN THE COUNTY COURT OF _____ COUNTY, NEBRASKA

In the Matter of:

Case No.: _____

(Ward/ Incapacitated Person/ Protected Person)

INITIAL DOCUMENT REVIEW WORKSHEET

*Petition Filed. Date: _____ Hearing Date set for: _____

A. To be completed and filed no later than 10 days prior to the hearing on Appointment

Must be filed before: _____

- 1. Criminal history background check Date: _____
- 2. Abuse and Neglect Registries for adults & children. Date: _____
- 3. Affidavit re: Sex Offender Registry Date: _____
- 4. Process Credit Check Date: _____

*Guardian/Conservator Appointed. Date of Appointment: _____

B. To be complete within 30 days of Appointment and PRIOR to Letters being issued, guardian/conservator

must file the following:

Must be filed before: _____

- 1. Acceptance Date: _____
- 2. General Information form Date: _____
- 3. Address Information form Date: _____
- 4. Personal and Financial form (if not filed with Proof of Restricted Account form) Date: _____
- 5. Inventory and Affidavit of Due Diligence – Sent to all interested parties with Notice to Interested Persons form (Inventory is reviewed by Judge or Clerk Magistrate to determine if bond is appropriate) Date: _____
- 6. Acknowledgement of Financial Institution Date: _____
- 7. Proof of Restricted Account (if applicable)(10 days) Date: _____
- 8. Bond (if required) Date: _____

*Letters issued. Date Letters issued: _____

C. **Clerk gives Guardian/Conservator quick reference guide** with all forms they will need to file attached

D. Guardians/conservators shall file Letters with the Register of Deeds in any county where the ward has real property or an interest in real property. Date: _____

E. To be completed within 10 days after Letters are issued: Must be filed before: _____

- 1. Guardian/Conservator must file Acknowledgement of Financial Institution form showing they have given copies of their Letters to the financial institution Date: _____
- 2. Personal and Financial form is filed Date: _____

F. To be completed within 90 days after Appointment: Must be filed before: _____

- 1. Complete training and file certificate with the court. Date: _____

G. Annual accounting packet is to be filed not later than 30 days after 1 year after Letters are issued :

Must be filed before: _____

Packet: A B C D E

Date Notated on Annual Review