

ANNUAL DOCUMENT REVIEW WORKSHEET

REQUIRED

Neb. Ct. R. §6-1442(G)

Estate of _____ Case No. _____

Complete boxed information with the first annual review only, unless changes are made

Date Permanent Letters issued: _____ Date Inventory filed: _____
Date letters filed with Register of Deeds if the inventory contains real estate or an interest in real estate: _____
Date of signed Order Approving Waiver: _____ (If applicable, note in comments section next to each item waived in the "Required Annual Activity" section below)
Date Budget approved (if applicable): _____

REQUIRED ANNUAL ACTIVITY

Annual Report on Condition of Ward Yes No Comments _____
Has the ward's home remained in the state? Yes No Comments _____
Updated Inventory Yes No Comments _____
Annual Accounting Yes No Comments _____
Bank Statements/Brokerage Reports for all accounts Yes No Comments _____
Personal and Financial Information for Guardianships and Conservatorships form Yes No Comments _____
Notice of Right to Object Yes No Comments _____
Certificate of Mailing to Interested Parties/Bonding Company Yes No Comments _____
Certificate(s) of Proof of Possessions for all institutions Yes No Comments _____

Account Information:

Certificates of Proof of Possession equal amounts listed in inventory Yes No
Checking Acct: XXXX# _____ Certification Date: _____ Certification Amount: _____
Restricted? Yes No
Savings Acct: XXXX# _____ Certification Date: _____ Certification Amount: _____
Restricted? Yes No
Cert of Deposit: XXXX# _____ Certification Date: _____ Certification Amount: _____
Restricted? Yes No
Investment Acct: XXXX# _____ Certification Date: _____ Certification Amount: _____
Restricted? Yes No
Other: XXXX# _____ Certification Date: _____ Certification Amount: _____
Restricted? Yes No
Other: XXXX# _____ Certification Date: _____ Certification Amount: _____
Restricted? Yes No

Which categories of income and receipts were used by the guardian/conservator?

Social Security? Yes No Comments _____
Veterans' benefits? Yes No Comments _____
Pension? Yes No Comments _____
Interest income? Yes No Comments _____
Dividend payments? Yes No Comments _____
Other: _____ Amount _____
Other: _____ Amount _____

Was a notice filed within 30 days of finding any newly discovered assets? Yes No

