

**QUICK REFERENCE FOR
GUARDIANS/CONSERVATORS
WITH AN APPROVED BUDGET**

REQUIRED

Neb. Ct. R. §6-1433(E)(1)

In the Matter of _____, ward/incapacitated
person/protected person

County: _____ Case number: _____

The anniversary date of your appointment is: _____
(one year after the Letters are issued)

You have been appointed as guardian with an approved budget.

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

1. **Acknowledgment of Financial Institution form, CC 16:2.6** - Must be filed within 10 days after getting your Letters and is filed after you give your Letters to the Financial Institution for them to make a copy. This form shows the court you have given copies of the Letters to the financial institution. After the initial filing of this form, you will need to file this form anytime you either change financial institutions or add a financial institution. (Neb. Ct. R. § 6-1443(B))
2. **Letters of Guardianship and/or Conservatorship** - Must be filed with the Register of Deeds in any county where the ward/incapacitated person/protected person has real property or an interest in real property.(Neb. Ct. R. § 6-1443(F))
3. **Complete training for Guardians and Conservators** – Must be completed within 90 days of appointment. Providers and class dates and locations are listed on the Supreme Court Website (<http://www.supremecourt.ne.gov/Guardian/guardian-info.shtml#education>).(Neb. Rev. Stat. § 30-2627(d))
4. **Guardianship with Budget Annual Reporting Forms (Packet B)** - Must be filed one year after the Letters are issued. You will receive notice 45 days before the reports are due. (Neb. Ct. R. § 6-1442(B))Packet B includes:
 - **Annual Budget Report** - This report has your budget as approved by the court, as well as any variations from the approved budget that may have occurred during the reporting period.
 - **Annual Report of Guardian on Condition of Ward** - If you are a conservator only, you do not need to complete this report. Each year, this form is completed by the guardian to update the court regarding activities with and on behalf of the ward/incapacitated person and to report on the ward's/incapacitated person's condition.
 - **Updated Inventory** - This form is a list of all the ward's/incapacitated person's/protected person's assets and will help you and the court keep track of the property, income, etc. of the ward/incapacitated person/protected person.
 - **Bank Statement** - You only need to file the last bank statement of the reporting period with all personal information (Social Security number, date of birth, account numbers, etc.) blacked out.

- Notice of Right to Object - Must be completed and sent to all interested persons.
- Personal and Financial Information form – This form is a confidential document which informs the court of the ward's/incapacitated person's/protected person's complete bank account numbers, etc. which cannot be included on forms which can be accessed by the public. THIS CONFIDENTIAL FORM IS FILED WITH THE COURT, BUT NOT SENT TO INTERESTED PERSONS.
- Please note: There is a \$5 court filing fee due with the Packet B annual reporting forms. Each of the form(s) you need are included in your packet. You may find the forms online at <http://www.supremecourt.ne.gov/forms/county/guardian-conservators.shtml> or you can make copies before using the original so that you will have them for future use.

The annual reporting forms listed above, except for the confidential Personal and Financial Information form, must be sent to all interested persons, and 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.

REMEMBER:

- NEVER co-mingle the money of the ward/incapacitated person/protected person with your personal accounts. If necessary, open new accounts immediately.
- You shall not pay yourself any money from the ward's/incapacitated person's/protected person's accounts without first receiving permission from the court as part of the approved budget. This includes any money for living expenses, if the ward/incapacitated person/protected person lives with you.
- You shall not make any ATM withdrawals or receive cash back on a debit transaction from any account without a court order as part of the approved budget. If an account is restricted, you cannot access that money without a court order.
- You must notify the court immediately if either you or your ward/incapacitated person/protected person has a change of address.
- You must notify the court within 3 days if the ward/incapacitated person/protected person dies.
- You must get court approval **prior** to moving the ward/incapacitated person/protected person out of the State of Nebraska.
- You must file your Letters with the Register of Deeds in any county the ward/incapacitated person/protected person has real property or an interest in real property.
- 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.