



# **COURT-APPOINTED GUARDIAN AND CONSERVATOR REPORTING INSTRUCTIONS**

# GUARDIAN AND CONSERVATOR REPORTING INSTRUCTIONS

These documents are your personal customized court reporting documents. You should read the instructions carefully, make sure you always have a blank copy, keep these instructions in a safe place and refer to them often, and *call Mr. Snider (801) 837-2598 if you have any questions.*

## Where to file your documents:

1. You should email, mail or hand deliver all original documents to the Court where your case was originally heard:

Second Judicial District  
Court Ogden Department  
2525 Grant Ave.  
Ogden, Utah 84401  
[chrisbk@utcourts.gov](mailto:chrisbk@utcourts.gov)

Farmington Department  
100 East Broadway  
Farmington, Utah 84201  
[2davidsd@utcourts.gov](mailto:2davidsd@utcourts.gov)

Third Judicial District Court  
Salt Lake Department  
100 East Broadway  
Salt Lake City, Utah 84114  
[Hå•|&|!| àæ^O ~&| ~|oE\[ç](mailto:Hå•|&|!| àæ^O ~&| ~|oE[ç)

Fourth Judicial District Court  
Provo Department  
137 N. Freedom Blvd, # 100  
Provo, Utah 84601  
[provofiling@utcourts.gov](mailto:provofiling@utcourts.gov)

2. You should include your case number on every document: SSSS S

This packet contains hard copies of the following documents:

*(Electronic copies are included on the enclosed CD or USB Drive under the "Annual Reporting Forms" Folder)*

- a. **Cover Sheet** File a Cover Sheet Every Time You Mail a Document to the Court
- b. **Inventory Report** You must file this report only once, **90 days** from the day you were appointed.
- c. **Notice of Right to Object** File this document every time you file a report. You must mail a copy to all "interested parties".
- d. **Report on Status of the Ward** This report must be filed **Annually** on or before your the day you were appointed Guardian.
- e. **Annual Accounting Report** File this report **Annually** along with the **Report on Status of Ward Report.**
- f. **Motion to Terminate** File this report only when you want to terminate the **Guardianship/ Conservatorship (i.e., the Ward passes away or is no longer incapacitated).**
- g. **Order on Motion to Terminate** File this form at the same time you file the **Motion to Terminate.**

4. The following is a list of which documents need to be filed, the filing deadline for each document, and who you need to mail copies to:

Form	Filed By	Deadline	Mail To
Acknowledgment of Restricted Account	Your financial institution should file this form	When you initially set up Ward's account	After your appointment you should contact a bank or credit union and set up a NEW RESTRICTED ACCOUNT. The financial institution should file an "Acknowledgment of Restricted Account with the Court.
Inventory Report	Conservator or Guardian if no Conservator appointed	<b>90 Days after initial appointment</b>	File original Report with the Court. Include a Cover Sheet. Mail copies to the Ward, Guardian, Conservator, and all Interested Persons
Report on Status of Ward	Guardian	<b>Annually within 60 days of the anniversary of your appointment</b>	File original Report with the Court. Include a Cover Sheet. Mail copies to the Ward, Guardian, Conservator, and all Interested Persons
Annual Accounting Report	Conservator	<b>Annually within 60 days of the anniversary of your appointment</b>	File original Report with the Court. Include a Cover Sheet. Mail copies to the Ward, Guardian, Conservator, and all Interested Persons
Notice of Right to Object	Guardian and Conservator	With Status Report, Inventory and Accounting Report	This document should be included when you mail a <b>Report on Status of Ward, Inventory Report, Annual Accounting Report, Motion to Terminate and Final Accounting Report</b>
Certificate of Mailing	Guardian and Conservator	File original Certificate with the Court and mail a copy to all parties every time you file something with the Court.	This document should be enclosed when you mail a <b>Report on Status of Ward, Inventory Report, Annual Accounting Report, or Final Accounting Report</b>

5. **Annual Accounting Report** You are required to file an Annual Accounting Report. As a part of this report you will need to keep track of the Ward's monthly income and expenses using the following categories:

#### Income Received During Reporting Period

Item	Description	Amount
1	Wages	\$
2	Interest	\$
3	Dividends	\$
4	Social Security	\$
5	Annuities	\$
6	Insurance	\$
7	Real Estate	\$
8	Stocks/Bonds Sold	\$

Item	Description	Amount
9	Money owed to Ward that was received	\$
10	Miscellaneous Property Sold	\$
11	Other (Describe)	\$
12	TOTAL	\$

**Expenses Paid Out During Reporting Period**

Item	Category	(Amount)
1	Mortgage/Rent	\$
2	Utilities (gas, electricity, water, sewage, phone, internet, etc.)	\$
3	Home Maintenance (Include maintenance, cleaning, repairs)	\$
4	Home Improvement (Include additions, remodeling, etc.)	\$
5	Home Furnishings	\$
6	Health Care (physicians, dentists, psychiatrists, etc.)	\$
7	Food	\$
8	Education	\$
9	Clothes	\$
10	Personal Effects	\$
11	Activities	\$
12	Transportation	\$
13	Taxes	\$
14	Charge for Conservator's Services	\$
15	Charge for Guardian's Services	\$
16	Charge for other Professional Services	\$
17	Court Fees	\$
18	Christmas and Birthday Gifts	\$
18	Other	\$
19	TOTAL (Total is incomplete. Ward pays many of her bills.)	\$

**6. You can fill out the documents on your computer or print them and fill in the blanks.**

**When you are finished, make sure you sign each document before you file a document with the Court be sure to:**

- a) Make a copy of each document for your own records.
- b) Be sure you **file all original documents** (your original signature) with the court.
- c) Make sufficient copies to **mail to each of each party named as an interested party** or who has asked for notice as an "Interested Party" under §75-5-406 U.C.A.

## Only use Motion to Terminate forms when you are asking the Court to terminate the Guardianship or Conservatorship

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- These instructions will help you complete the forms. If you have difficulty after reading these instructions, contact attorney [Kent Snider at \(801\)837-2598](#)
- Keep a copy of all documents for your records.
- You will need to attend all court hearings or contact Mr. Snider and make arrangements for someone from Snider Law Group to attend the hearing.

### (1) Motion to Terminate Guardianship or Conservatorship

- Print your name and contact information at the top of the first page. Check whether you are the protected person, the guardian and/or conservator or an interested person or the attorney for the protected person, guardian and/or conservator, or interested person.
- Print the county name and the court address in the blank lines. Complete the heading exactly as it appears in the petition.
- Check the correct boxes to show whether you are asking to terminate a guardianship or a conservatorship or both.
- Paragraph (1): Check the correct boxes to show whether you are asking to terminate a guardianship or a conservatorship or both.
- Paragraph (2): Check the correct boxes to show why you are asking to terminate the guardianship or conservatorship.
- Paragraph (3): If you are required to file annual accountings for the estate, attach the final accounting. You may use the same form and checklist as for an annual accounting, but under “reporting period” show the date on which the accounting ends.
- Paragraph (4): Check the correct box to show how the protected person’s estate should be distributed.
- Date and sign the form.
- Complete the Certificate of Service.
- Serve the form and any attachments on the interested persons by one of the methods described in the certificate of service. [URCP 5](#) governs service.
- File the original form and certificate of service with the judicial services representative.
- If a party objects to the motion after receiving it and notice of right to object, then the court will scheduled a hearing and send out notice of hearing to the parties. Prepare the order as directed by the court at the hearing.

## **(2) Notice of Right to Object**

- You must serve the Notice of the Right to Object with the Motion to Terminate Guardianship or Conservatorship. [CJA 6-501](#).
- Print the county name and the court address in the blank lines.
- Complete the heading exactly as it appears in the petition.
- Print the name and address of the person to whom the notice is being given.
- Date and sign the form.
- Attach the form to the Motion to Terminate Guardianship or Conservatorship.
- Serve the form and any attachments on the interested persons by one of the methods described in the certificate of service. [URCP 5](#) governs service.
- File the original form and certificate of service with the judicial services representative.

## **(3) Order on Motion to Terminate Guardianship or Conservatorship**

- Print your name and contact information at the top of the first page. Check whether you are the guardian or conservator or an interested person or the attorney for the guardian or conservator or interested person.
- Print the county name and the court address in the blank lines. Complete the heading exactly as it appears in the petition.
- If the parties stipulate to the motion or default on the motion, complete the rest of the Order so that it agrees with the motion.
- Date and sign the Order under the phrase: “approved as to form.”
- After preparing the documents, serve them on the interested persons by one of the methods described in the certificate of service. [URCP 5](#) governs service.
- The interested persons have 7 days in which to object as to form of the proposed order.
- If the parties stipulate to the motion or default on the motion, file the original Order and the Certificate of Service with the judicial services representative as soon as they are prepared. Otherwise, file the original Order and the Certificate of Service with the judicial services representative after the time to object has ended.
- If a party objects to the motion after receiving it and notice of right to object, then the court will schedule a hearing and send out notice of hearing to the parties. Prepare the order as directed by the court at the hearing.