



In the Matter of

Name of person for whom guardianship is sought

Petitioner:

Street Address Apt # PO Box

()

City State Zip Code Area Telephone
Code

ANNUAL FIDUCIARY REPORT

I, _____, make this periodic final Fiduciary's Report for the
Guardian of the Property
period from _____ to _____.
Date Date

Part I.

THE FIDUCIARY ESTATE now consists of the following assets: (Attach additional sheets, if necessary. State amount of any mortgages, liens, or other indebtedness, but do not deduct when determining estimated fair market value.)

A. REAL ESTATE (State location, liber/folio, balance of mortgage and name of lender, if any)

Location	Liber/Reference	Balance of Mortgage	Name of Lender	Est. Fair Market Value

B. CASH AND CASH EQUIVALENT (State the name of financial institution, account number and type of account) (**Attach Photocopies of Statements**)

Name of Bank	Account Number	Type of Account	Present Fair Market Value

C. PERSONAL PROPERTY (Itemize motor vehicles, regardless of value. Describe all other property generally if total value is \$1,500; state amount of any lien; itemize, if total value is over \$1,500)

Description of Property	Estimated Fair Market Value

D. STOCKS (State number and class of shares, name of corporation)

No. and Class of Share	Name of Company	Stock Value	Present Fair Market Value

E. BONDS (State face value, name of issuer, interest rate, maturity date)

Name of Issuer	Interest Rate	Face Value	Maturity Date	Present Fair Market Value

F. OTHER (Describe generally, e.g. debts owned to estate, partnerships, cash value of life insurance policies, etc.)

Description	Estimated Fair Market Value

Part II. The following was collected and disbursements were made: (attach additional sheets, if necessary)

A. INCOME (e.g. pension, social security, rent, annuities, dividends, interests, refunds)

Source Of Income	Amount
TOTAL RECEIPTS	

B. ASSETS DELETED OR SOLD

Date	Description of Transaction	Gross Proceeds	Selling Costs	Carrying Value	Gain / (Loss)

A summary of the Fiduciary's Estate is as follows:

<u>Type of Property</u>	<u>Value report on Inventory Report or last Fiduciary Report</u>	<u>Value report on this Fiduciary Report</u>
a. Real Estate	_____	_____
b. Cash & Equivalent	_____	_____
c. Personal Property	_____	_____
d. Stocks	_____	_____
e. Bonds	_____	_____
f. Other	_____	_____
Total	_____	_____

The Fiduciary bond, if any, which has been filed in this action in the amount of \$_____.

VERIFICATION

I do solemnly declare and affirm under the penalties of perjury that the contents of the foregoing inventory are true and correct to the best of my knowledge, information and belief.

Signature of the Fiduciary Date

Print Name of Fiduciary

Street Address Apt # PO Box

()

City State Zip Code Area Code Telephone

Signature of the Fiduciary Date

Print Name of Fiduciary

Street Address Apt # PO Box

()

City State Zip Code Area Code Telephone