

INSTRUCTIONS

The purpose of this report is to give the court as complete a picture as possible of the individual's current situation and what has happened in the last 12 months. The court will review your report within 30 days of receipt and send out either an approval letter or a deficiency notice requesting additional information. Every three years, a Court Visitor will be appointed to discuss with you various aspects of the conservatorship.

Follow the directions in this form or your report may not be approved and a deficiency will be sent to you to complete the report.

When filling out the form:

- If you got this form from the internet, download and save the blank PDF form to your local device. Then reopen it before filling it out. The form may not work or save correctly if you fill it out on your internet browser.
- Only file using single-sided printing.
- If filling out by hand, print clearly using black ink.
- Use the same dates as provided to you by the court each year. The report should reconcile within the year, as well as from year to year.
- Do not leave any question blank. If it does not apply, write "n/a" or provide an explanation.
- Be sure to attach the required documentation as requested on this report, such as bank statements. Bank statements should reflect the accounting you provide. If you charge for rent or room and board, this should be easily seen in the statement. If you have a lot of cash withdrawals, you should have receipts to back up accounting.
- If you need to add additional information to any area of the report, please use a separate sheet of paper. Only write on one side of the paper.

In preparing this report, you must consult with the protected person as much as possible. As a conservator, you must be more diligent with the protected person's money than you may be your own—even if the person only receives basic entitlements. Your accounting must be accurate. You may not use estimates. You must have documentation of your accounting available for court inspection at any time

If you need help with this report, contact the Alaska Court System's Guardianship Helpline at (907) 264-0520 or visit the Court's self-help page at ak-courts.info/gc. There is also a monthly class on the annual report, offered on the second Tuesday of each month from 12:00 to 1:30 PM. Register for the class at <https://courts.alaska.gov/shc/guardian-conservator/classes.htm>.

This page is for your information only. It does not need to be filed with the report.

IN THE SUPERIOR COURT FOR THE STATE OF ALASKA
AT _____

In the Matter of the Protective Proceedings of:)
)
)
 _____)
 (Name of Protected Person)) Case No: _____
 Date of Birth: _____)
 _____)

CONSERVATORSHIP ANNUAL REPORT

A. Reporting Period

This report covers the following period: From: _____ To: _____

B. Information about the Conservator

If you check this box, your contact information will be changed in the system. You can also use [PG-195](#) to change contact information if needed during the year.

1. Name: _____ Email: _____
Mailing Address: _____
Residence Address: _____
Phone: _____ cell home other Phone: _____ cell home other
 I agree the court and other parties can email me court documents instead of using regular mail.

2. Do you live with the protected person? Yes. No.

3. Relationship to the protected person *[parent, sibling, etc.]*: _____

4. Have there been any major changes to your status, such as health changes, arrests, criminal convictions, or other major changes in the past 12 months?
 No. Yes. If yes, explain:

5. If you are a private conservator charging fees, is there a court order authorizing payment of fees and establishing an hourly rate and maximum monthly amount as required by Probate Rule 17 and AS 08.26.110? Yes. No. I do not charge fees.

6. List name and contact information for any co-conservators or separate guardians:
[Include full name, mailing address, residence address (if different), email, and daytime phone number.]
 I am the only conservator for the protected person, and there is no separate guardian.

C. Information about the Protected Person

Physical Address: _____
 Personal Phone: _____ cell home other
 Phone number where person can be reached, if different than above: _____
 Email: _____

D. Changes in Conservatorship

1. Do you think there need to be any changes in the conservatorship? No. Yes.
[Think about whether or not the protected person still needs a conservator. Are there any less-restrictive alternatives, or has the protected person learned additional skills such that informal supports would be sufficient? Are you able to continue as conservator?]
 If yes, explain:

[If you want the court to change its order, file form [PG-190](#).]

2. Do you want the court to schedule a review hearing? No. Yes.

E. Information about the Conservatorship

1. Housing.

Has the protected person moved in the past 12 months? No. Yes. If yes, explain:

Describe in general terms the protected person’s housing expenses:

Are there any significant changes in housing expenses from the previous year?
 No. Yes. If yes, explain:

2. Medical and Mental Health Care.

Describe in general terms the protected person’s medical and mental health care expenses:

Are there any significant changes in medical or mental health expenses from the previous year? No. Yes. If yes, explain:

3. Personal Care, School, and Work Activities.

Describe in general terms the protected person’s schooling or job training expenses:

N/A – no schooling or job training expenses

Are there any significant changes in schooling or job training expenses from the previous year? No. Yes. If yes, explain:

Is the protected person employed?

Yes. *[Describe the person’s job below, including type of work, name of employer, address, phone, and how long employed.]*

No. *[Explain why not below.]*

Describe in general terms expenses related to recreational or social activities that the protected person enjoys:

4. Contacts with the Protected Person.

Does the protected person live with you?

Yes.

No. How often have you visited in person with the protected person in the past 12 months? *[Include where you met.]*

Have there been any other contacts? No. Yes, as follows:

Type of Contact

Frequency of Contact

by telephone

by mail, email, or text message

through 3rd person named _____

other: _____

5. Decision-Making.

Does the protected person participate in financial decisions? Yes. No, because:

Have there been any changes in the protected person's ability to make decisions about matters affecting their finances or property?

- No changes.
- Yes, the protected person is: less able. more able.

If yes, describe the changes in ability and what caused them, if known:

6. Significant Actions.

Describe any significant actions (for example, major purchases, refinances, sale of valuable property) you took as conservator for the protected person during the past 12 months:

Are you a private, professional conservator?

- No.
- Yes. You must also do/answer the following:
 1. Provide a copy of your accounting used to keep track of income and expenses.
 2. Provide a breakdown of the monthly fees you are paid. Include a detailed invoice of what services were provided for each fee charged.
 3. Is your license in good standing with the State of Alaska? Yes No
 4. Do you have liability insurance?
 - Yes, and my documentation is attached.
 - No, because:

As conservator, do you use a representative payee?

- No.
- Yes. Name of payee: _____
 Does the payee control all of the protected person's money?
 - Yes. *[Fill out section F, but you may include the payee's detailed accounting information as documentation.]*
 - No. Describe what the payee controls and what you control:

F. Financial Information

- I am an OPA appointed conservator.**
[Skip sections 1 & 2. Attach detail from financial system.]
- I am not an OPA appointed conservator.**

1. Annual Income.

****Only list the income of the protected person during the 12-month reporting period. Do not list your income. Must be annual amounts, not monthly.****

[If there are more income sources than fit on this page, attach extra pages or cross out an unused category and write it in.]

<u>a. Income Source</u>	<u>Annual Amount</u>
Wages/Salary: _____	_____
Social Security Benefits: _____	_____
Dividends/Interest: _____	_____
Adult Public Assistance: <i>[for example, ATAP, TANF, Food Stamps]</i>	_____
_____	_____
_____	_____
Veterans Financial Benefits: _____	_____
Senior Care Benefit: _____	_____
Alaska Permanent Fund Dividend	_____
Native Corporation Dividend: _____	_____
Rental Income: _____	_____
Pension: _____	_____
Annuities: _____	_____
Other: _____	_____
Other: _____	_____
Other: _____	_____
Other: _____	_____

TOTAL ANNUAL INCOME **\$**_____

b. Have there been any major changes or disruptions to an income source in the last 12 months (for example, loss of benefits, new benefits, pay raise at work, etc.)?

- No. Yes. If yes, explain:

c. In the last 12 months, have there been any sources of income for the protected person that are **not** expected to be ongoing (for example, an inheritance, vehicle sale, gambling winnings, cash gifts, etc.)? *[You may include items of any amount, but must report any cash received of \$1000 or more.]*

- No.
- Yes. List each item, approximately when it was received, and amount:

2. **Annual Expenses.**

****List all money paid from the protected person’s funds to anyone. Do not include your personal expenses. Must be annual amounts, not monthly.****

[If there are more expenses than fit on this page, attach extra pages or cross out an unused category and write it in.]

<u>a. Expense</u>	<u>Annual Amount</u>
Nursing/Assisted Living Home: _____	_____
Room and Board <i>[Only fill out if you have room and board authorization.]</i>	_____
Rent or Mortgage Payment: _____	_____
Utilities: <i>[Leave blank if you have room and board authorization.]</i>	_____
_____	_____
_____	_____
_____	_____
Transportation: _____	_____
Medication: _____	_____
Medical Treatment: _____	_____
Cell Phone: _____	_____
Food <i>[Leave blank if you have room and board authorization.]</i>	_____
Clothing: _____	_____
Entertainment/Hobbies: _____	_____
Travel/Vacation: _____	_____
Personal Expenses (allowance/money given to the protected person)	_____
Taxes: _____	_____
Home/Property Maintenance: _____	_____
Insurance Premiums: <i>[home/renter’s, auto, medical, life, etc.]</i>	_____
_____	_____
_____	_____
_____	_____
Gifts: _____	_____
Child/Spousal Support: _____	_____
Fees/Costs Paid to Conservator: _____	_____
Reimbursements to Conservator <i>[Attach documentation/receipts]</i>	_____
Other: _____	_____
Other: _____	_____
Other: _____	_____
Other: _____	_____

TOTAL ANNUAL EXPENSES **\$** _____

b. Have there been any major new expenses in the last 12 months? Were you able to eliminate or reduce any major expenses in the last 12 months?
 No. Yes. If yes, explain:

3. Income and Expense Tracking.

Describe how you keep track of income and expenses for the protected person (for example, accounting software, separate paper files, etc.):

Do you use a credit card to pay the protected person's expenses? No. Yes.
[If yes, explain below whether the credit card belongs to the protected person or the guardian, and list which expenses in section 2 are covered by the credit card payments.]

4. Money Controlled by the Protected Person.

Does the protected person have sole control over any money? No. Yes.
 If yes, does the protected person have their own:

- bank account: _____ *[bank name & account no.]*
- debit card or credit card: _____ *[last 4 numbers of card]*
- cash allowance of: \$_____ per month
- other: _____

Is this money included in the income and expenses listed in #1 and #2?
 Yes. No, because:

5. Assets.

[List all assets the protected person owns individually or jointly. Attach extra pages if necessary. Write only on one side of the page.]

a. **Cash on hand (not in an account).** \$ _____
Amount Location

b. **Bank Accounts.** *[Checking, Savings, ABLE/Medicaid Qualifying Trusts, etc.]*
 N/A. The protected person does not have any of these types of accounts.

Name of Bank or Institution	Type of Account	Account No.	Balance
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

****REQUIRED: Attach 12 months of bank statements that match the reporting period.****
If the only activity on the account was interest accrual (no deposits or withdrawals), you may attach just the most recent statement.

c. **Alaska Native Corporation Dividend Account.**

N/A. The protected person does not have an Alaska Native Corp. Dividend account.

Name of Bank or Institution	Type of Account	Account No.	Balance
_____	_____	_____	_____

****REQUIRED: Attach the most recent statement for end month of your report.****

d. **Brokerage Accounts, Stocks, Bonds, Certificates of Deposit, & Other Securities.**

N/A. The protected person does not have any of these types of accounts.

<u>Name of Company</u>	<u>Name on Account</u>	<u>Date of Balance</u>	<u>Balance</u>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

****REQUIRED: Attach the most recent statement for end month of your report.****

e. **Retirement Account.**

N/A. The protected person does not have a retirement account.

<u>Name of Company</u>	<u>Beneficiary</u>	<u>Current Value</u>
_____	_____	_____

****REQUIRED: Attach the most recent statement for end month of your report.****

f. **Life Insurance Policy.**

N/A. The protected person does not have a life insurance policy.

<u>Name of Insurance Company</u>	<u>Beneficiary</u>	<u>Face Value</u>	<u>Cash Value</u>
_____	_____	_____	_____

****REQUIRED: Attach the most recent statement for end month of your report.****

g. **Burial Account.** *[An account reserved for burial/funeral expenses.]*

N/A. The protected person does not have a burial account.

<u>Name of Bank or Institution</u>	<u>Type of Account</u>	<u>Account No.</u>	<u>Balance</u>
_____	_____	_____	_____

****REQUIRED: Attach the most recent statement for end month of your report.****

h. **Changes in Accounts.**

Explain any major changes in the last 12 months to the accounts listed or cash available to the protected person. Include whether accounts have been newly opened, cashed out, or had large transfers between them. (N/A, no major changes in last 12 months)

i. **Real Estate (land and buildings).**

(1) Does the person own a home? No. Yes. Estimated Value: \$ _____

Address: _____

Description: _____

Is there a joint owner? No. Yes, name: _____

(2) Other Real Estate. Estimated Value: \$ _____

Address: _____

Description: _____

Is there a joint owner? No. Yes, name: _____

****Attach most recent tax assessments for the properties, if available.****

j. Vehicles (cars, boats, snow machines, airplanes, etc.).

<u>Description of Vehicle (year/make/model)</u>	<u>Location</u>	<u>Co-Owner</u>	<u>Value</u>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

k. Other Valuable Personal Property.

[List any item that has a value of \$1000 or more. Include collectibles and any other items that are particularly susceptible to theft, such as guns, jewelry, or art. Also include any valuable licenses, such as fishing permits. Give enough detail to allow another person to identify the items.]

<u>Description of Item</u>	<u>Location</u>	<u>Value</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

l. Changes in Real Estate and Personal Property.

Explain any major changes in the last 12 months to the value of any real estate, vehicles, or other valuable property that the protected person owns. Include whether any significant items were sold or purchased, and whether the value of any property changed by \$1000 or more (for example, home improvement projects, accident damage to vehicles, etc.). (N/A, no major changes in last 12 months)

TOTAL ASSETS *[Total value of all money & items in section 5]* \$ _____

6. Debts and Other Liabilities.

[Attach extra pages if necessary. Write only on one side of the page.]

a. Mortgages.

- (1) Home described in #5(i)(1). Loan balance: \$ _____
- (2) Property described in #5(i)(2). Loan balance: \$ _____

b. Amounts Owed for Services, including to the Guardian or Conservator.

[If the protected person owes money to the guardian or conservator, you must describe what the debt was for on a separate page and attach all receipts, invoices, or other documentation to support the charges.]

<u>Service</u>	<u>Name of Person or Business Owed</u>	<u>Balance Due</u>
(1) Medical	_____	_____
(2) Medical	_____	_____
(3) Attorney	_____	_____
(4) Guardian/Conservator	_____	_____
(5) _____	_____	_____

c. Other Debts.

[List all debts or money the protected person owes that are not already listed in sections a or b above. Include the type of debt (for example: credit card, auto loan, court fine or judgment, lien on home, etc.). List the total amount of the remaining debt on the end date of the reporting period—do not list monthly or other periodic payment amounts.]

<u>To Whom Owed</u> <i>[name of creditor, lender, or credit card company]</i>	<u>Type of Debt</u>	<u>Balance Due</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

d. Changes in Debts and Liabilities.

Explain any major changes in the last 12 months to the amount of money the protected person owes. Include whether any debts were paid off and whether any of the debts listed above are new or increased by \$1000 or more. (N/A, no major changes in last 12 months)

TOTAL DEBTS *[Total of all money owed in section 6]* \$ _____

7. NET ASSETS:

Total Assets from section 5 \$ _____

Total Debts/Liabilities from section 6 \$ _____

Net Estate Value *[Subtract Total Debts from Total Assets]* \$ _____

8. Trusts.

Is the protected person a beneficiary of a trust?

I don't know. *[Skip to section G.]*

No. *[Skip to section G.]*

Yes. Name of Trust: _____

Name and Address of Trustee: _____

If registered with the court, list trust registration no. _____ State: _____

Is the protected person receiving the benefits from the trust that the protection person is supposed to receive? Yes. No. I don't know.

Were there any changes to the trust arrangements/benefits in the last 12 months?

No. Yes, describe:

G. Other Information

1. Did the protected person help you prepare (provide information for) this report?

Yes. No.

2. Do you have any other concerns? Is there any other important information you believe the court should know?

No.

Yes, I have the following concerns or information:

IMPORTANT

After you complete the report, please review it before filing with the court, to make sure you have attached all required documentation as instructed (for example, all of the required bank statements or other financial records). You must include receipts and other supporting documents for any unusual accounting issues or any reimbursements to the guardian or conservator.

I swear or affirm under penalty of perjury that everything I wrote in this report is true and correct to the best of my knowledge and belief.

_____ Date _____ Conservator's Signature

Instructions: Give a copy of this report to all of the persons listed in the text box below (this is called "service" and is required by law). Check your court order if you are unsure about whether you must serve any other persons not specifically listed below. You can either mail the report by first-class mail or hand-deliver it. If using mail, write the date that you put the envelope in the mailbox. You may also send the report by email if the recipient agreed to email service. If you are not able to serve any of the required persons, please explain below.

Certificate of Service

I certify that I served a copy of this report and all of its attachments to:

the protected person on _____ at _____ [date/time]
by mail hand-delivery email

the protected person's attorney or guardian ad litem (if currently represented)
on _____ at _____ [date/time] by mail hand-delivery email

family member the protected person lives with (if any): _____
on _____ at _____ [date/time] by mail hand-delivery email

my co-conservator (if any): _____
on _____ at _____ [date/time] by mail hand-delivery email

the protected person's guardian (if separate guardian appointed): _____
on _____ at _____ [date/time] by mail hand-delivery email

the following persons designated by court order:

I could not give the report to a person who should get a copy, because:

_____ Conservator's Signature