

STATE OF VERMONT

SUPERIOR COURT

PROBATE DIVISION

Unit

Case No. _____

In re Guardianship of :

**SUMMARY OF ACCOUNT
for ADULT GUARDIANSHIP**

As the guardian(s) of the above named adult, I/we hereby account to the Court for the period beginning _____ and ending _____

*Date of Your Appointment as
Guardian or Date of Last Accounting*

End Date for This Accounting Period

- This is an interim account.
- This is a final account.

ACCOUNTING WORKSHEET

Complete the Schedules in Sections A, B and C first. For each schedule (A1-A7, B1-B7 and C1-C2) that you enter an amount greater than 0, you MUST include an itemized accounting on a separate sheet of paper. Once you total the amount for each section, you must then record those totals on the Summary of Account on page 3. You must complete all sections top and bottom. If there is no value, please indicate with a zero.

SECTION A – ASSETS and RECEIPTS

| Schedule | | Value |
|----------|--|-------|
| A-1 | Personal estate: <i>(per inventory value or last account)</i> | \$ |
| A-2 | Real estate: <i>(per inventory value or last account)</i> | \$ |
| A-3 | Gain on personal estate sold <i>(attach itemized list)</i> | \$ |
| A-4 | Gain on real estate sold <i>(attach itemized list)</i> | \$ |
| A-5 | Income to estate since inventory last account <i>(attach itemized list)</i> | \$ |
| A-6 | Personal and/or real estate not listed on inventory <i>(attach itemized list)</i> | \$ |
| A-7 | Monies advanced to estate <i>(attach itemized list)</i> | \$ |
| | TOTAL ASSETS AND RECEIPTS Add all lines in Section A | \$ |

SECTION B – DISBURSEMENTS

You must complete all sections top and bottom. If there is no value, please indicate with a zero. List only disbursements since estate opened or last account

| | | |
|-----------------|---|----|
| Schedule B-1 | Loss on personal estate sold <i>(attach itemized list)</i> | \$ |
| B-2 | Loss on real estate sold <i>(attach itemized list)</i> | \$ |
| B-3 | Paid debts <i>(attach itemized list)</i> | \$ |
| B-4 | Administrative expenses <i>(attach itemized list)</i> | \$ |
| B-5 | Attorney fees <i>(attach itemized statement)</i> | \$ |
| B-6 | Guardian fees if approved by the Court <i>(attach itemized statement)</i> | \$ |
| B-7 | Other disbursements <i>(attach itemized list)</i> | \$ |
| | TOTAL DISBURSEMENTS Add all lines in Section B | \$ |

SECTION C – BALANCE HELD BY GUARDIAN

| | | |
|-----|---|----|
| C-1 | Personal Estate: Include values for cash in bank accounts, stocks, bonds, cars, etc. If real estate has been sold, include the net proceeds from the sale. <i>(attach itemized list)</i> | \$ |
| C-2 | Real Estate: Include the value of any real property. If there is no real estate or if all real estate has been sold, enter zero. The proceeds from any real estate that has been sold should be entered on line C-1. <i>(attach itemized list)</i> | \$ |
| | TOTAL BALANCE HELD BY GUARDIAN Add line C-1 and C-2 | \$ |

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Case No. _____

In re Guardianship of:

[Empty box for case name]

SUMMARY OF ACCOUNT

- This is an interim account.
- This is a final account.

ACCOUNT SUMMARY (totals taken from accounting worksheet(s))

| | |
|--|----------|
| 1. TOTAL ASSETS and RECEIPTS from Section A | \$ _____ |
| 2. TOTAL DISBURSEMENTS from Section B | \$ _____ |
| 3. BALANCE HELD BY GUARDIAN <i>Subtract Line (2) from Line (1)</i> | \$ _____ |
| REAL ESTATE (Value of real estate not sold) | \$ _____ |
| PERSONAL ESTATE (Include value of all personal property including cash, stocks, bonds, cars, etc.) | \$ _____ |

I/We declare that the above statements are true and accurate to the best of my knowledge and belief. I/We understand that if the above statements are false, I/We will be subject to the penalty of perjury or to other sanctions in the discretion of the court.

Guardian Information

Date: _____

Signature _____

Printed Name _____

Mailing Address

Phone Number _____

Email Address _____

Co-Guardian Information

Date: _____

Signature _____

Printed Name _____

Mailing Address

Phone Number _____

Email Address _____

STOP: Did you include an itemized list for each schedule where the value you recorded was greater than zero? The itemized lists must be attached to this form when you file it. At the top of each list, please indicate clearly the Section of the Form, the Schedule letter and number (e.g. A-1) and the type of asset, receipt or disbursement (e.g. Section B, Schedule B-3, Paid Debts).

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[Empty rectangular box for case name]

MOTION TO ALLOW ACCOUNT

I/We, _____ request that the Court allow the account as set forth in the attached Summary of Account for Adult Guardianship. I have attached an itemized list for each schedule that has a value greater than zero.

Guardian Information

Date: _____

Signature _____

Printed Name _____

Mailing Address

Phone Number _____

Email Address _____

Co-Guardian Information

Date: _____

Signature _____

Printed Name _____

Mailing Address

Phone Number _____

Email Address _____

Note: If there are co-guardians, both guardians must sign.