

**STATE OF VERMONT**

**SUPERIOR COURT**

**PROBATE DIVISION**

**Unit**

**Case No.** \_\_\_\_\_

**In re Guardianship of:**

**SUMMARY OF ACCOUNT  
for MINOR FINANCIAL GUARDIANSHIP**

As the financial guardian(s) of the above named minor, 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 <b>not</b> listed on inventory <i>(attach itemized list)</i>	\$
A-7	Monies advanced to the guardian(s) for the guardianship <i>(attach itemized list)</i>	\$
	<b>TOTAL ASSETS AND RECEIPTS</b> <b>Add all lines in Section A</b>	\$

<b>SECTION B – DISBURSEMENTS</b>		
<i>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</i>		
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 previously approved by the Court <i>(attach itemized statement)</i>	
B-7	Other disbursements <i>(attach itemized list)</i>	\$
	<b>TOTAL DISBURSEMENTS</b> <b>Add all lines in Section B</b>	\$
<b>SECTION C –BALANCE HELD BY GUARDIAN</b>		
C-1	<b>Personal Estate:</b> Include values for cash in bank accounts, stocks, bonds, cars, etc. If real estate has been sold, include the <b>net</b> proceeds from the sale. <i>(attach itemized list)</i>	\$
C-2	<b>Real Estate:</b> 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>	\$
	<b>TOTAL BALANCE HELD BY GUARDIAN</b> <b>Add line C-1 and C-2</b>	\$

STATE OF VERMONT

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Unit

Case No. \_\_\_\_\_

In re Guardianship of :

[Empty box for case name]

SUMMARY OF ACCOUNT

- Interim or final account checkboxes

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

Table with 3 columns: Description, Amount, and Dollar sign. Rows include Total Assets, Total Disbursements, Balance Held by Guardian, Real Estate, and Personal Estate.

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

Three lines for mailing address

Phone Number \_\_\_\_\_

Email Address \_\_\_\_\_

Co-Guardian Information

Date: \_\_\_\_\_

Signature \_\_\_\_\_

Printed Name \_\_\_\_\_

Mailing Address

Three lines for 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).

STATE OF VERMONT

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Case No. \_\_\_\_\_

In re Guardianship of:

[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 Minor Financial 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.*