

**Rule 7.11 — Form 4: Annual Report of Conservator**

 *If filing electronically, you must provide any protected information in full on form 6, according to Division VI of Chapter 16 of the Iowa Court Rules.*

 *If filing in paper, you may use form 6 to provide any protected information in full.*

**In the Iowa District Court for \_\_\_\_\_ County**

**In the Matter of the Conservatorship of:**

Probate no. \_\_\_\_\_

\_\_\_\_\_  
*Full name: first, middle, last*

*If the Ward is a minor, use initials only*

**Annual Report of Conservator**

**Ward.**

1. This Report is for the period from: *Use ending date of last accounting when applicable*

\_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_ to \_\_\_\_/\_\_\_\_/\_\_\_\_\_  
*Month Day Year Month Day Year*

2. Total cash on hand at close of the last accounting: \$ \_\_\_\_\_.

3. Total sum of funds received during this report period: \$ \_\_\_\_\_.  
*Include as attachment "A" an itemization showing date received, source of funds, and amount.*

4. Total sum of disbursements made during this report period: \$ \_\_\_\_\_.  
*Include as attachment "B" an itemization showing date, who was paid, and amount paid for item or service.*

5. Balance of cash on hand at the close of this report period: \$ \_\_\_\_\_.

6. The other assets of the Ward at the close of this report period are:  
*Include a listing of assets held and the value or remaining balances as attachment "C."  
If assets remained the same from the last report, a copy of the last listing may be used.*

7. Were changes made in investment during this report period?  Yes  No  
*If yes, include as attachment "D" an itemized list of changes when applicable.*

8. The total value of assets of the Ward at the close of this report period: \$ \_\_\_\_\_.

9. Amount of Conservator's bond: \$ \_\_\_\_\_. Surety is: \_\_\_\_\_.  
*Company providing bond*

10. Guardian: *Check one*

A.  The name of the Ward's Guardian is: \_\_\_\_\_  
*Full name: first, middle, last*

B.  The Ward has no Guardian. *If you check B, you must fill in the following information.*

(1) The residence and physical location of Ward:

\_\_\_\_\_  
*Street address City State ZIP code*

(2) General physical and mental condition of Ward:

\_\_\_\_\_  
\_\_\_\_\_

**11. Other information relating to affairs of the conservatorship:**

*If conservatorship has special circumstances that do not adapt to this form, include attachment "F," setting out special circumstances in detail.*

**12. Fees for Conservator are:**  hereby applied for  waived.

*Attach Affidavit per Iowa Code section 633.202.*

**13. Fees for Conservator's attorney:** *Check one*

should be set by the court.

are not requested.

are waived or not applicable.

*Attach Affidavit per Iowa Code section 633.202, if fees requested.*

**14. Oath and Signature**

I, \_\_\_\_\_, have read this Report, and I certify under  
*Print Conservator's name*

penalty of perjury and pursuant to the laws of the State of Iowa that the information I have provided in this Report is true and correct.

\_\_\_\_\_, 20\_\_\_\_\_  
*Month Day Year Conservator's signature\**

\_\_\_\_\_  
*Mailing address City State ZIP code*

(\_\_\_\_\_) \_\_\_\_\_  
*Phone number Email address Additional email address, if applicable*

*\* Whether filing electronically or in paper, you must handwrite your signature on this form. If you are filing electronically, scan the form after signing it and then file electronically.*

**Note:** Bank statements, checks, receipts, stubs, and other items evidencing receipt of funds and payment must be available to the court on demand.