

**Rule 7.11 — Form 5: Final 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. \_\_\_\_\_

**Final Report of Conservator**

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

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

**Ward.**

1. This Final 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. Other assets of the Ward at the close of this Final Report.

*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

*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. Termination: *Include as attachment "E" a statement of reasons for termination. Check one*

A.  The court on the \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_\_, ordered termination.

B.  Termination is concurrently sought with approval of final report.

10. On termination, funds and assets of this conservatorship will be distributed, if any, to the following:

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

\_\_\_\_\_  
*Relationship to Ward*

11. Has notice of hearing on Final Report been waived?  Yes  No

*If waived, attach copy of waiver.*

12. Amount of Conservator's bond: \$\_\_\_\_\_. Surety is:\_\_\_\_\_.

*Company providing bond*

Order approving final report and termination should discharge surety and release bond.

**13. Guardian** *Check one*

A.  The Conservator is also the Guardian and has filed a Final Report of Guardian on \_\_\_\_\_, 20\_\_\_\_\_.  
*Month Day Year*

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

C.  The Ward has no Guardian. *If you check C, 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:

\_\_\_\_\_

**14. 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.*

**15. Have final court costs been paid?**  Yes  No

**16. Fees for Conservator are:**  hereby applied for  waived.  
*Attach Affidavit per Iowa Code section 633.202.*

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

A.  should be set by the court.

B.  are not requested.

C.  are waived or not applicable.

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

**18. Receipt(s) of the distributee(s) for the funds and assets of the conservatorship:**  
*Check one*

A.  are attached.

B.  will be attached to supplemental report after court approves Final Report.

**19. Oath and Signature**

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

of perjury and pursuant to the laws of the State of Iowa that the information I have provided in this Final 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.