

<b>In the Iowa District Court for _____ County</b>	
<b>In the Matter of the Conservatorship of:</b>  _____ <i>Full name: first, middle, last</i> <i>If the protected person is a minor, use initials only</i> <b>Protected Person.</b>	Probate no. _____  <b>Report of Conservator</b>  <p style="text-align: right;">Iowa Code § 633.670(3)</p>

1. This report is for the period from: *Use ending date of last accounting*  
\_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_ to \_\_\_\_/\_\_\_\_/\_\_\_\_.  
*Month Day Year Month Day Year*
  
2. This report is *check one*
  - A.  an annual report.
  - B.  a report filed within thirty days following the removal of the Conservator.
  - C.  a report filed with the Conservator's filing of a resignation and before the resignation is accepted by the court.
  - D.  a report filed within sixty days following the termination of the conservatorship.
  - E.  a report filed pursuant to court order.
  
3. Total funds on hand at close of the last accounting: \$ \_\_\_\_\_.
  
4. Total funds received during this report period: \$ \_\_\_\_\_.  
*Include as attachment "A" an itemization showing date received, source of funds, and amount.*
  
5. Total disbursements made during this report period: \$ \_\_\_\_\_.  
*Include as attachment "B" an itemization showing date, who was paid, and amount paid for item or service.*
  
6. Total funds on hand at the close of this report period: \$ \_\_\_\_\_.
  
7. Other assets of Protected Person at the close of this report period are:  
*Include as attachment "C" a listing of assets held and the value or remaining balances.*
  
8. The total value of assets of Protected Person at the close of this report period: \$ \_\_\_\_\_.
  
9. Were changes made in investment during this report period?  Yes  No  
*If yes, include as attachment "D" an itemized list of changes.*
  
10. Amount of Conservator's bond: \$ \_\_\_\_\_. Surety is: \_\_\_\_\_.  
*Company providing bond*

*Continued on next page*



**14. Other information reflecting the condition of the conservatorship estate:**

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Check this box if you have attached a sheet with additional information.

**15. Fees for Conservator are** *check one*

applied for.

waived.

*Attach affidavit relative to compensation. (Iowa Code section 633.202.)*

**16. Fees for Conservator's attorney** *check one*

should be set by the court.

are not requested.

are waived or not applicable.

*Attach affidavit relative to compensation. (Iowa Code section 633.202.)*

**17. Oath and signature**

I, \_\_\_\_\_, have read this conservator's report, and I certify  
*Print Conservator's name*

under 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.