

**Rule 7.12—Form 4: Notice of Filing Conservator's Initial Plan or Amended Plan**

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

In the Matter of the Conservatorship of:

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

*If the protected person is a minor, use initials only.*

**Protected Person.**

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

**Notice of Filing  
Conservator's**

**Initial Plan**

**Amended Plan**

Iowa Code § 633.670(1)(b)

To: \_\_\_\_\_  
*Name of Protected Person*

\_\_\_\_\_  
*Name of Protected Person's Attorney (if applicable)*

\_\_\_\_\_  
*Name of Court Advisor (if applicable)*

You are notified that \_\_\_\_\_,  
*Name of Conservator or financial institution*

as conservator of \_\_\_\_\_,  
*Name of Protected Person*

filed a Conservator's *Check one*

Initial Plan

Amended Plan

on \_\_\_\_\_, 20\_\_\_\_.  
*Month Day Year*

All initial plans or amended plans must outline Conservator's plan for protecting, managing, investing, expending, and distributing the assets of the conservatorship. The plan must be based on the needs of Protected Person and take into account the best interest of Protected Person as well as Protected Person's preference, values, and prior directions to the extent known to, or reasonably ascertainable by, Conservator.

*Continued on next page*

If you need assistance to participate in court due to a disability, call the disability coordinator (information at [www.iowacourts.gov/Administration/Directories/ADA\\_Access/](http://www.iowacourts.gov/Administration/Directories/ADA_Access/)). Persons who are hearing or speech impaired may call Relay Iowa TTY (1-800-735-2942). **Disability coordinators cannot provide legal advice.**

At a minimum, all initial plans or amended plans must include:

- (1) A budget containing projected expenses and resources for Protected Person, including an estimate of the total amount of fees Conservator anticipates charging per year and a statement or list of the amount Conservator proposes to charge for each service Conservator anticipates providing to Protected Person.
- (2) A statement as to how Conservator will involve Protected Person in decisions about management of conservatorship assets.
- (3) If ordered by the court, any steps Conservator plans to take to develop or restore the ability of Protected Person to manage conservatorship assets.
- (4) An estimate of the duration of the conservatorship.

A copy of the filed plan is included with this notice.

**Any person entitled to a copy of the plan must file any objections to the plan not later than fifteen days after it is filed.**

Conservator's Information:

\_\_\_\_\_, 20\_\_\_\_  
*Month Day Year Signature*

\_\_\_\_\_  
*Conservator's printed name*

\_\_\_\_\_  
*Name of financial institution, if applicable*

\_\_\_\_\_  
*Conservator's title, if applicable*

\_\_\_\_\_  
*Mailing address*

\_\_\_\_\_  
*City*

\_\_\_\_\_  
*State*

\_\_\_\_\_  
*ZIP code*

(\_\_\_\_\_) \_\_\_\_\_  
*Phone number*

\_\_\_\_\_  
*Email address*

\_\_\_\_\_  
*Additional email address, if applicable*