

ATTORNEY OR PARTY WITHOUT ATTORNEY (Name, State Bar Number and Address)  TELEPHONE NO.: _____ FAX NO. (Optional): _____ E-MAIL ADDRESS (Optional): _____ ATTORNEY FOR (Name): _____	FOR COURT USE ONLY
<b>SUPERIOR COURT OF CALIFORNIA, COUNTY OF MERCED</b> <input type="checkbox"/> 627 W. 21st Street, Merced, CA 95340 <input type="checkbox"/> 1159 "G" Street, Los Banos, CA 93635 <b>PROBATE DEPARTMENT</b>	
IN THE MATTER OF THE ESTATE OF: _____	CASE NUMBER _____
<b>PETITION FOR SETTLEMENT OF</b> _____ <input type="checkbox"/> <b>AND FINAL ACCOUNT</b> (check if final account) <small>(ACCOUNTING NUMBER ("FIRST", ETC.))</small> <input type="checkbox"/> <b>ACCOUNT CURRENT</b> (check if interim) <input type="checkbox"/> <b>AND FOR COMPENSATION TO</b> <input type="checkbox"/> <b>CONSERVATOR/GUARDIAN/TRUSTEE</b> <input type="checkbox"/> <b>ATTORNEY</b>	

**Petitioner(s)** (name(s)): \_\_\_\_\_ alleges:

1. Petitioner was appointed  conservator  guardian  trustee of the  person and  estate of (name): \_\_\_\_\_ on (date): \_\_\_\_\_  
 letters were issued on (date): \_\_\_\_\_.

2. The following Inventory and Appraisal(s) have been filed with the court:

Date Filed:	Partial No.	Type:	Final	Supplemental	Corrected/Amended	Amount:
						\$
						\$
						\$

Information regarding additional inventories filed is indicated on Attachment 2.

3. This account and report covers the period from (date): \_\_\_\_\_ to (date): \_\_\_\_\_.
4. The petitioner is chargeable and is entitled to the credits set forth in the attached Summary of Account and Schedules (Attach Judicial Council Forms GC-400, et seq. or GC-405, et seq.). If the conservatee, minor, or beneficiary is deceased, report transactions up to date of death. Post-death transactions must be on separate schedules.
5.  a. There are no changes in the form of non-cash assets of the estate other than the sales of real property and personal property listed in a schedule of gains or losses.  
 or  
 b. Attached as Schedule F is a statement of any changes in the form of non-cash assets of the estate other than the sales of real and personal property listed in a schedule of gains or losses on sales. (Attach form GC-400(F)).
6.  a. There are no known liabilities of the estate.  
 or  
 b. Attached as Schedule G is a statement of all liabilities of the estate (Attach form GC-400(G)).
7.  a. There was no cash to invest in interest-bearing accounts.  
 or  
 b. At all times during the period of this account, petitioner has kept all surplus cash invested in interest-bearing accounts.

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8. a. Bond in the matter is currently set at \$\_\_\_\_\_.
- b. The current income and assets of the estate are as follows (CRC § 7.207):
- (1) Probable annual income, including public benefits: \$ \_\_\_\_\_
  - (2) Personal property: \$ \_\_\_\_\_
  - (3) Equity in real property that is subject to a power to sell under Probate Code §2591(d): \$ \_\_\_\_\_
  - (4) Sub-total of (1) through (3): \$ \_\_\_\_\_
  - (5) Ten percent of the first \$500,000 of sub-total at (4): \$ \_\_\_\_\_
  - (6) Twelve percent of the amount at (4) between \$500,000 and \$1,000,000: \$ \_\_\_\_\_
  - (7) Two percent of the amount at (4) above \$1,000,000: \$ \_\_\_\_\_
  - (8) Total (add (4) through (7)): \$ \_\_\_\_\_
- c. The bond amount is  sufficient  is insufficient and should be increased to the amount indicated in 8(b)(8) above  is excessive and should be reduced to the amount indicated in 8(b)(8) above,  should be waived because the estate qualifies under Probate Code § 2323  is not required because the conservator of the estate is a corporate fiduciary or an exempt government agency.

9.  a. No family or affiliate relationship exists between petitioner and any agent hired by petitioner during the period of this accounting  
or
- b. The following family or affiliates were hired:

Name	Capacity Retained	Relationship

Information on additional family/affiliate relationships attached as Attachment 9.

10. Petitioner  waives compensation or  requests compensation of \$ \_\_\_\_\_ for services rendered during the period of this account. An itemization of the hourly rate and services rendered by the Petitioner is provided in Attachment 10.
- The amount of \$ \_\_\_\_\_ has already been paid as periodic payments pursuant to the order of this court on (date): \_\_\_\_\_, leaving a balance of \$ \_\_\_\_\_.
- Petitioner requests authority to make periodic payments of \$ \_\_\_\_\_ per month for up to 24 months from the end date of this account to petitioner for the services rendered by petitioner on a periodic basis. (Describe the specific services and the reasons for this authority in Attachment 10.)

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11. Petitioner's Attorney (name): \_\_\_\_\_  waives compensation  
 requests compensation of \$\_\_\_\_\_ for services rendered during the period of this account. An itemization of the hourly rate and services rendered by petitioner's attorney is provided in Attachment 11.  
 Petitioner's attorney did use paralegals, and the information required by California Rule of Court, Rule 7.754 is contained in Attachment 11.  
 The amount of \$\_\_\_\_\_ has already been paid leaving a balance of \$\_\_\_\_\_. The amount paid was advanced by Petitioner from his or her individual funds.

12.  Petitioner requests reimbursement for costs advanced in the amount of \$\_\_\_\_\_ by  petitioner  
 petitioner's attorney (name): \_\_\_\_\_.  
 An itemization of the date, amount, payee, and purpose of each cost is provided in Attachment 12.

13. The estate  does  does not include income or property from the Veteran's Administration, either directly, or as income or interest on money received from the Veteran's Administration.

14. The estate  does  does not include income or property from the conservatee's / ward's Indian tribe, either directly, or as income or interest on money received from the Indian tribe.

15. During this account period the conservatee / ward / beneficiary  has  has not been a patient in or on leave of absence from a state hospital under the jurisdiction of the California Department of State Hospitals or the California Department of Developmental Services.

16. Filed concurrently with this account and report is Merced Superior Court Local Form #MSC-PR-007 which contains all required original financial statements for this accounting period.

17.  a. No requests for special notice have been filed in this proceeding.  
 or  
 b. The following requests for special notice have been filed in this proceeding:

Name	Capacity Retained	Relationship

Information regarding additional requests for special notice is attached as Attachment 17.

18.  Petitioner requests other orders be granted (*specify in Attachment 18*).

19.  a. This is an account current. The conservatee/ward/beneficiary is now living at:  
 (address): \_\_\_\_\_.

b. This is a final account, as indicated in the Attachment for Final Accounts (Local Form #MSC-PR-006A).

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**WHEREFORE, petitioner prays:**

- 20. That this account be approved and settled;
- 21. The acts of the conservator/guardian/trustee shown in the account and report be approved;
- 22. That bond be  found sufficient  increased by \$\_\_\_\_\_
  - decreased by \$\_\_\_\_\_  waived under Probate Code § 2323
  - not required because the conservator of the estate is a corporate fiduciary or an exempt government agency.
- 23.  That petitioner be directed to pay Petitioner the sum of \$\_\_\_\_\_ as compensation for services rendered during the period of this account.
- 24.  That petitioner also be authorized to make periodic payments of \$\_\_\_\_\_ per month for up to 24 months from the end date of this account to Petitioner for services rendered on a periodic basis.
- 25.  That for legal services rendered during the period of this account the petitioner be directed to:
  - pay petitioner's attorney from estate funds the sum of \$\_\_\_\_\_.
  - pay petitioner from estate funds the sum of \$\_\_\_\_\_ as reimbursement for attorney fees advanced.
- 26.  That petitioner be directed to pay from estate funds the sum of \$\_\_\_\_\_ to:  Petitioner
  - Petitioner's attorney as reimbursement for costs advanced.
- 27.  That other orders be made as specified in number 18 above.
- 28.  That petitioner be ordered to distribute the remaining assets of the estate as specified in the Attachment for Final Accounts (Local Form #MSC-PR-006A).

I declare under penalty under the laws of the State of California that the foregoing is true and correct.

Dated: \_\_\_\_\_ (SIGNATURE OF ATTORNEY)

Dated: \_\_\_\_\_ (TYPE OR PRINT NAME OF PETITIONER) \_\_\_\_\_ (TYPE OR PRINT NAME OF PETITIONER)