

INSTRUCTIONS FOR ANNUAL CONSERVATOR'S REPORT AND ACCOUNTING

Thank you for serving as a conservator. You provide an important service for the Ward. Every year, you are required to file an Annual Conservatorship Report.

1. Due Dates. The annual report is due every year, within 60 days of the date you were appointed as the Conservator. For example, if the court issued its order appointing you as the Conservator on March 1, 2020, then your annual report is due every year after that between March 1 and April 30. If the court that created the conservatorship ordered you to file your report on a different date, then you will need to file by the date the court set. Wyo. Stat. § 3-3-901.
2. Sign in Front of a Notary. The annual report has to be verified, which means it has to be signed in front of a notary. Wyo. Stat. § 3-3-901. There are many places to get a notary, and it usually is quite fast. There are also online notaries in Wyoming. Do not sign the report before you are in front of the notary. Sign it in front of the notary and be sure you bring a form of photo identification with you. The notary will need to see that when you sign.
3. Getting Ready to Fill Out Your Report. It may be useful to gather the following before you fill out your annual report.
 - a. The last report you filed. On this annual report, you will need that to state the date that the prior report was filed and what the value of the estate was at the time of that prior report. If this is your first annual report, you will need to use the inventory of the Ward's estate instead of the last report to state the prior value.
 - i. An inventory form is attached to this packet as an optional form. It can be a helpful tool for you to use if the value of the estate or the assets in the estate have changed significantly.
 - b. Proof of receipts collected for the Ward since the last report. That could be things like bank deposits, check stubs, photos of gifts, Venmo/paypal/e-payment logs or it might be something else. You will make a list of what was collected for Exhibit B of the annual report.
 - c. Proof of expenses paid for the Ward since the last report. That could be things like copies of checks written, or credit card statements, Venmo/paypal/e-payment logs, or something else. You will make a list of what was collected for Exhibit C of the annual report.
 - d. Proof of any changes in value for the Ward's assets. This could be things like new real estate appraisals, or changes in investment account values reported on quarterly statements, or something else.

Thank you again for serving as a conservator.

**IN THE DISTRICT COURT OF SUBLETTE COUNTY, WYOMING
NINTH JUDICIAL DISTRICT**

In the Matter of the Conservatorship of

_____,
Ward.

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Probate No. _____

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Comes now _____ (conservator's name), the Conservator in this matter, and provides this annual conservatorship report required by Wyo. Stat. § 3-3-901 and -902.

Estate Value

1. This is the annual report for the period from _____ (insert the date of your last annual report (or the initial inventory if this is your first report)) to _____ (insert today's date). Wyo. Stat. Ann. § 3-3-902(a).
2. At the date of the last report, which was filed on _____ (insert the date of the date last annual report (or the initial inventory if this is your first report)), the value of the conservatorship was: \$ _____. Wyo. Stat. § 3-3-902(a)(i).
 - a. _____ Attached is Exhibit A reflecting the last period's estate value.
3. Since the date of the last report, the conservatorship has RECEIVED, from any source: \$ _____. Wyo. Stat. § 3-3-902(a)(i).
 - a. _____ Attached is Exhibit B showing all cash or assets received and collected.

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4. The SUBTOTAL of Paragraphs 2 and 3 is (add Total Estate Value reported in Paragraph 2 and Receipts reported in Paragraph 3): \$_____.
5. Since the date of the last report, the following amount was paid out as of the conservatorship: \$_____. Wyo. Stat. § 3-3-902(a)(ii).
- a. ____ Attached is Exhibit C reflecting this period's disbursements, expenditures, and/or cash paid out of the Ward's assets.
6. The following changes in the value of the assets occurred since the last accounting was filed. Wyo. Stat. § 3-3-902(a)(iii). These changes are not reports of receipts or expenditures but are changes in asset values, such as an increase or decrease in real estate values, stock values, or any other property managed by the conservatorship for the Ward.
- a. ____ No changes.
- b. ____ The following changes occurred:
(describe)_____

_____. (If the changes are significant, you may, but are not required to, attach Exhibit D as an updated inventory).
7. The TOTAL ESTATE VALUE at end of this conservatorship period is calculated by subtracting the Expenditures in Paragraph 5 from the Subtotal in Paragraph 4 and accounting for any changes in investment or asset values reported in Paragraph 6. Use this worksheet to determine the total current estate value:
- The amount reported in Paragraph 4: _____
- Minus – The amount reported in Paragraph 5: _____

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Plus + The amount reported in Paragraph 6: _____. (If Paragraph 6 was a decrease in value, then you may be subtracting the change of value instead of adding it)

Equals the total current estate value: \$ _____

Bond

8. There ____ is/ ____ is not (pick either is or is not) a bond in this case. If there is a bond, the name of the surety is _____ and the amount to the bond is \$ _____. Wyo. Stat. § 3-3-902(a)(iv).

Residence and Condition of the Ward

9. The residence or physical location of the Ward is:

_____.

Wyo. Stat. § 3-3-902(a)(v).

10. The general physical and mental condition of the Ward is:

_____. Wyo. Stat. § 3-3-902(a)(vi).

Duties of the Conservator

11. When the conservatorship was created, the Conservator was granted (pick either a or b, but not both):

- a. ____ the ordinary duties of a conservator, without special order of the court.
b. ____ special duties of a conservator, with a special order of the court.

Wyo. Stat. § 3-3-902(a)(vii) (referring to Wyo. Stat. §§ 3-6-606, -607).

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12. There ____ have or ____ have not (pick either have or have not) been any changes to the duties of the conservator since the last report was filed. If there were changes, those

changes are: _____

_____ (describe changes).

Other Information

13. The Conservator wishes to share the following other information with the Court about the condition of the Ward or the affairs of the conservatorship (you may attach more pages if necessary):

_____. Wyo. Stat. § 3-3-902(a)(viii).

Signature

I, _____ (name) do swear or affirm that this report is a true and complete account of the administration of the estate since the last report and accounting was filed.

Dated this ____ day of _____, 20____,

Signature

Name

Address

Telephone Number

E-Mail

NOTARY

State of: _____

County of: _____

This instrument, entitled ANNUAL CONSERVATOR'S REPORT AND ACCOUNTING, was signed and sworn (or affirmed) before me on the _____ day of _____, 20____, by _____ (name).

Seal: _____

Signature

Name of Notary

My commission expires: _____

ANNUAL CONSERVATOR'S REPORT AND ACCOUNTING

EXHIBIT A

Total estate value at the end of the prior accounting period: \$_____.

Attach the appropriate page of the previous Annual Conservator's Report and Accounting,
or you may attach the initial inventory if this is your first annual report.

EXHIBIT B

Receipts collected since the last accounting period: \$_____.

<u>Date collected</u>	<u>From who and for what</u>	<u>Amount</u>
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EXHIBIT C

Expenditures (payments made from the Ward's assets) since the prior accounting period:

\$ _____.

<u>Date paid</u>	<u>To whom and for what</u>	<u>Amount</u>
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EXHIBIT D (optional)

Inventory of the Ward's Estate

REAL ESTATE OWNED BY THE WARD

(description/address) Value: _____

(description/address) Value: _____

CHECKING ACCOUNT(S)

(description/name of bank or credit union) Value: _____

(description/name of bank or credit union) Value: _____

OTHER ACCOUNTS (savings accounts, investment accounts, retirement accounts, etc.)

(description/name of financial institution) Value: _____

(description/name of financial institution) Value: _____

(description/name of financial institution) Value: _____

PERSONAL PROPERTY

(description) Value: _____

(description) Value: _____

(description) Value: _____

Attach additional pages if necessary.