

# STATE OF MAINE

\_\_\_\_\_ COUNTY PROBATE COURT DOCKET NO. \_\_\_\_\_

In Re: \_\_\_\_\_  
Individual Subject to Conservatorship

CONSERVATOR'S REPORT<sup>1</sup>

Conservatorship was granted on \_\_\_\_\_. As required by 18-C  
M.R.S. § 5-423, the Conservator makes this Report for the following reason(s):<sup>2</sup>

- Annual report
- Resignation of Conservator
- Removal of Conservator
- Termination of Conservatorship
- As directed by the Court by order dated \_\_\_\_\_.

This Report covers the period beginning \_\_\_\_\_ and ending \_\_\_\_\_.

1. List the services provided to the individual subject to conservatorship:

2. Describe any recommended change in the conservatorship, including its scope and whether the conservatorship needs to continue:

3. Describe anything of more than de minimis value that the Conservator, any individual who resides with the Conservator or the spouse, domestic partner, parent, child or sibling of the Conservator has received from a person providing goods or services to the individual subject to conservatorship:

4. Describe any business relation the Conservator has with a person providing goods or services to the individual subject to conservatorship:

5. Describe any business relation the Conservator has with a person the Conservator has paid or a person that has benefited from the property of the individual subject to conservatorship:

6. State whether any coconservator or successor conservator appointed to serve when a designated future event occurs is alive and able to serve:

7. In addition, the Conservator must attach the following additional documents to this Report:

a. An accounting (Form PP-407) that contains a list of property included in the conservatorship estate and of the receipts, disbursements, liabilities and distributions during the period for which this Report is made, attached as Exhibit A.

b. An annual credit report of the individual subject to conservatorship and to the extent feasible, a copy of the most recent reasonably available financial statements evidencing the status of bank accounts, investment accounts and mortgages or other debts of the individual subject to conservatorship, with all but the last 4 digits of the account numbers and the individual's social security number redacted, attached as Exhibit B.

c. A copy of the Conservator's most recently approved plan dated \_\_\_\_\_, attached as Exhibit C. If the Conservator has deviated from the plan, describe how and why the Conservator has deviated from the plan:

#### NOTICE

The Conservator is required to provide notice of the filing of this Report, together with a copy of the Report, to the individual subject to conservatorship, all persons entitled to notice under section 5-411(5) or a subsequent order, and other persons as the Court determines; ***provided, however, that the annual credit report of the individual subject to conservatorship (Exhibit B) is confidential and may not be provided with the rest of the Conservator's report except to the individual subject to conservatorship.*** The notice and Report must be given not later than 14 days after filing.

The Conservator may petition the Court for approval of a report or accounting. An order, after notice and hearing, approving a final report or accounting discharges the Conservator from all liabilities, claims and causes of action by a person given notice of the report or accounting and the hearing as to a matter adequately disclosed in the report or accounting.<sup>3</sup>

The Conservator declares that the statements contained in this Report are true and accurate to the best of such Conservator's belief.

Dated \_\_\_\_\_

\_\_\_\_\_  
Conservator

Attorney for Conservator, if any:

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Name

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Address

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Address

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Phone Number

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Maine Bar Number

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<sup>1</sup> 18-C M.R.S. § 5-423.

<sup>2</sup> 18-C M.R.S. § 5-423(1).

<sup>3</sup> 18-C M.R.S. § 5-423(8).

MARP