

CAUSE NO. _____-2

IN THE GUARDIANSHIP OF

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IN THE PROBATE COURT

NUMBER TWO OF

AN INCAPACITATED PERSON

TARRANT COUNTY, TEXAS

ORDER APPROVING ANNUAL ACCOUNTING

On this day the Annual Account of this Estate was heard and considered by the Court, and after examining the Account and reviewing the evidence in support of same, the Court hereby APPROVES the Annual Account, and the Clerk of this Court is ORDERED to re-issue Letters of Guardianship consistent with the prior orders of this Court.

SIGNED this _____ day of _____, 20____.

JUDGE PRESIDING

APPROVED:

Telephone: _____

Telecopier: _____

Electronic mail:

ATTORNEY FOR GUARDIAN

IN THE GUARDIANSHIP OF

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IN THE PROBATE COURT

NUMBER TWO OF

AN INCAPACITATED PERSON

TARRANT COUNTY, TEXAS

ANNUAL ACCOUNTING
FOR THE PERIOD [DATES]

TO THE HONORABLE JUDGE OF SAID COURT:

NOW COMES _____, Guardian of the Estate herein, and respectfully presents this verified account pursuant to the provisions of Section 1163 of the Texas Estates Code.

1. **PERIOD OF ACCOUNT.** This accounting covers the twelve-month period shown above.
2. **OPENING FIGURES.** The property of the Estate, as shown on the Inventory, Appraisement & List of Claims [**OR**] the last Annual Accounting approved on _____, was as follows:

REAL PROPERTY

_____	\$ _____

_____	\$ _____

TOTAL REAL PROPERTY	\$ _____

PERSONAL PROPERTY

_____	\$ _____

_____	\$ _____

TOTAL PERSONAL PROPERTY	\$ _____

CASH ON HAND

Listed by account number and bank location.

_____	\$ _____

_____	\$ _____

TOTAL CASH ON HAND \$ _____
OPENING FIGURES - TOTAL PROPERTY AND CASH ON HAND \$ _____

3. PROPERTY NOT PREVIOUSLY REPORTED. The following property has come into the hands of your Guardian which has not been previously reported to the Court:

None,

[OR]

\$ _____

\$ _____

\$ _____
TOTAL PROPERTY NOT PREVIOUSLY REPORTED \$ _____

4. CHANGES. The following changes have occurred in the condition of the Estate which have not been previously listed or inventoried:

None

[OR]

A. By Order signed _____ \$ _____
B. By Order signed _____ \$ _____
C. _____ \$ _____
TOTAL CHANGES IN PROPERTY \$ _____

5. RECEIPTS. The receipts of the Estate are as shown in the attached Exhibit "A", and are summarized as follows:

Interest on Estate Accounts \$ _____
Refunds \$ _____
Rental Income \$ _____
Dividends \$ _____
Proceeds from Sale of Estate Assets \$ _____

\$ _____

\$ _____
TOTAL RECEIPTS \$ _____

6. DISBURSEMENTS. The disbursements of the Estate are as shown in the attached "B", and are summarized as follows:

Support and Maintenance \$ _____
Attorney's Fees \$ _____
Bond Premium \$ _____
Bank Charges \$ _____
Taxes \$ _____
Expenditures authorized by Court Order \$ _____

\$ _____

_____ \$ _____
_____ \$ _____
TOTAL DISBURSEMENTS

7. PROPERTY AND CASH ON HAND. The property currently being administered and cash remaining in the hands of your Guardian are as follows:

REAL PROPERTY
_____ \$ _____
_____ \$ _____
_____ \$ _____
_____ \$ _____
_____ \$ _____
TOTAL REAL PROPERTY \$ _____

PERSONAL PROPERTY: Confirmations of securities attached.
_____ \$ _____
_____ \$ _____
_____ \$ _____
_____ \$ _____
_____ \$ _____
TOTAL PERSONAL PROPERTY \$ _____

CASH ON HAND: Verifications are attached.
_____ \$ _____
_____ \$ _____
_____ \$ _____
TOTAL CASH ON HAND \$ _____
TOTAL PROPERTY AND CASH ON HAND \$ _____

8. SAFEKEEPING. The following assets belonging to the Estate are being held subject to safekeeping agreements: Confirmations of safekeeping are attached.

None

[OR]

_____ \$ _____
_____ \$ _____

TOTAL ASSETS IN SAFEKEEPING \$ _____

9. UNPAID DEBTS. The following debts and expenses of the Estate have not been paid and are presently due and owed by the Estate:

None

[OR]

_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
TOTAL UNPAID DEBTS	\$ _____

10. CLAIMS. The claims which have been presented against the estate are as follows:

None

[OR]

Claimant's name & address	Nature of claim	Amount allowed and approved	Amount rejected	Amount paid	Amount allowed but not paid
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
TOTAL CLAIMS				\$ _____	

11. OTHER FACTS NECESSARY FOR A FULL UNDERSTANDING OF THE CONDITION OF THE ESTATE, INCLUDING, BUT NOT LIMITED TO THE PAYMENT OF INSURANCE AND TAXES, IF ANY, ON ASSETS OF THE ESTATE:

None

[OR]

12. RECONCILIATION. The following is a summary and reconciliation of the foregoing paragraphs of this account:

	CASH	TOTAL ESTATE
12.2 OPENING FIGURES	\$ _____	\$ _____
12.3 PROPERTY NOT	\$ _____	\$ _____

PREVIOUSLY REPORTED			
12.4	CHANGES IN PROPERTY	\$ _____	\$ _____
12.5	RECEIPTS	\$ _____	\$ _____
12.6	DISBURSEMENTS	\$ (_____)	\$ (_____)
	TOTAL 12.2 THROUGH 12.6	\$ _____	\$ _____
12.7	PROPERTY AND CASH ON HAND	\$ _____	\$ _____
12.8	ASSETS IN SAFEKEEPING	\$ _____	\$ _____
	TOTAL 12.7 THROUGH 12.8	\$ _____	\$ _____
12.9	UNPAID DEBTS		\$ _____
12.10	CLAIMS		\$ _____
	TOTAL NET VALUE OF ESTATE		\$ _____

WHEREFORE, PREMISES CONSIDERED: your Guardian prays that the Court review and approve said Account.

Respectfully submitted,

_____, guardian

ATTORNEY FOR GUARDIAN

AFFIDAVIT OF GUARDIAN

THE STATE OF TEXAS §
§
COUNTY OF TARRANT §

Guardian, _____, being first duly sworn, upon his/her oath, deposes and says that:

I am the Guardian in the above entitled and numbered cause. I have read and examined the foregoing Annual Account which is to be filed in this cause and:

- A. *The account contains a true, correct and complete statement of the matters to which the account relates;*
- B. *the guardian has paid the bond premium for the next accounting period;*
- C. *the guardian has filed all tax returns of the ward due during the accounting period; and*
- D. *no taxes were owed by the ward during the accounting period.*

[OR]

the guardian has paid all taxes the ward owed during the accounting period;

- 1. *the amount of the taxes was \$ _____;*
- 2. *the date the guardian paid the taxes was _____;*
- 3. *the governmental entity to which the taxes were paid was _____.*

[OR]

the guardian has NOT paid all taxes the Ward owed during the accounting period for this(these) reason(s):_____.

[OR]

the guardian has NOT filed all tax returns of the Ward due during the accounting period for the reason that _____.

GUARDIAN OF THE ESTATE

SWORN TO AND SUBSCRIBED this ____ day of _____ 20__.

NOTARY PUBLIC, STATE OF TEXAS

CAUSE NO. _____-2

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IN THE PROBATE COURT

NUMBER TWO OF

AN INCAPACITATED PERSON

TARRANT COUNTY, TEXAS

VERIFICATION OF FUNDS ON DEPOSIT

The undersigned, an officer of the financial institution named below, hereby certifies that _____, Guardian of this Estate, had on deposit with this institution as of _____ in the following accounts, the amounts shown below:

Checking Account No. _____ \$ _____

Savings Account No. _____ \$ _____

Certificate of Deposit No. _____ \$ _____

SIGNED this ____ day of _____, 20__.

_____ Bank
Fort Worth, Texas

By _____
Name: _____
Title: _____

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AN INCAPACITATED PERSON

TARRANT COUNTY, TEXAS

VERIFICATION OF SECURITIES

The undersigned, an _____, hereby certifies that _____, Guardian of this Estate, had on deposit with _____ as of the __ day of _____, 20__, the following assets:

_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____

SIGNED this ____ day of _____, 20__.

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IN THE PROBATE COURT

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AN INCAPACITATED PERSON

TARRANT COUNTY, TEXAS

CONFIRMATION OF SAFEKEEPING

The undersigned, an officer of the financial institution named below, hereby certifies that _____, Guardian of the Estate, had on deposit with this institution as of _____ in the following accounts, the following described securities or other assets held subject to orders of the Court:

Checking Account No. _____	\$ _____
Savings Account No. _____	\$ _____
Certificate of Deposit No. _____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____

SIGNED this _____ day of _____, 20____.

_____, Bank
Fort Worth, Texas

By _____
Name: _____
Title: _____