

No.

IN RE: THE

GUARDIANSHIP OF

INCAPACITATED

§
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§
§

IN THE PROBATE COURT

OF

Hamilton COUNTY, TEXAS

ANNUAL ACCOUNT FOR THE PERIOD
THROUGH

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	\$ _____
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<u>OPENING FIGURES - TOTAL PROPERTY AND CASH ON HAND</u>	\$ _____
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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:

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

TOTAL PROPERTY NOT PREVIOUSLY REPORTED	\$ _____
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4. CHANGES. The changes in the Estate are as shown in the attached Exhibit "A", and are summarized as follows:

A. _____	\$ _____
B. _____	\$ _____
C. _____	\$ _____

TOTAL CHANGES IN PROPERTY	\$ _____
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5. RECEIPTS. The receipts of the Estate are as shown in the attached Exhibit "B", and are summarized as follows:

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

TOTAL RECEIPTS	\$ _____
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6. **DISBURSEMENTS.** The disbursements of the Estate are as shown in the attached Exhibit "C", and are summarized as follows:

Support and Maintenance by Order dated: _____ *	\$ _____
Medical Expenses by Order dated: _____	\$ _____
Attorney's Fees by Order Dated _____	\$ _____
Bond Premium by Order Dated _____	\$ _____
Bank Charges by Order Dated _____	\$ _____
Taxes by Order Dated _____	\$ _____
Other Expenditures by Order Dated: _____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
Purchase of Assets	\$ _____
TOTAL DISBURSEMENTS	\$ _____

*If there is a monthly allowance in place, please provide the date the Order was signed and the monthly amount authorized.

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 or in the Court’s Registry: Confirmations of safekeeping are attached.

_____	\$ _____

_____	\$ _____

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:

_____	\$ _____

_____	\$ _____

_____	\$ _____

TOTAL UNPAID DEBTS	\$ _____

10. **CLAIMS.** The claims which have been presented against the estate are as follows (Reference TEC §1163.001(1)(a):

_____	\$ _____
_____	\$ _____
_____	\$ _____
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:

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

		Cash	Total Estate
2	Opening Figures		
3	Property Not Previously Reported		
4	Changes In Property		
5	Receipts		
6	Disbursements		
	Total 2 through 6		
7	Property And Cash On Hand		
8	Assets In Safekeeping		
	Total 7 through 8		
9	Unpaid Debts		
10	Claims		
	Total Net Value Of Estate		

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

Respectfully submitted

_____, guardian

THE STATE OF TEXAS COUNTY OF _____

'Before me, the undersigned authority, on this day personally appeared _____, who being first duly sworn, states on oath that the report above is a true and complete statement of the matters pertaining to the estate and financial's of the Ward _____, (a minor/an incapacitated person, as of the date stated in the report.

Signed: _____ Signed: _____
Guardian Guardian

Sworn to and subscribed before me on this the ____ day of _____, 20____.

Notary in and for the State of Texas

No.

IN RE: THE	§	IN THE PROBATE COURT
	§	
GUARDIANSHIP OF	§	OF
	§	
_____ INCAPACITATED	§	Hamilton 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 hearing the evidence in support of same, the Court finds as follows:

1. That the Court has jurisdiction of this proceeding and of the subject matter as required by law;
2. The Annual Accounting has remained on file for a full ten days before being considered; and
3. That the Annual Account has been audited and settled by the Court and should be approved as filed.

IT IS, THEREFORE, ORDERED ADJUDGED AND DECREED that the Annual Account is hereby APPROVED, and the Clerk of this Court is FURTHER ORDERED to re-issue Letters of Guardianship consistent with the prior orders of this Court.

SIGNED this _____ day of _____, 20 ____.

JUDGE PRESIDING