

Your Name: \_\_\_\_\_  
 Your Address: \_\_\_\_\_  
 Your City, Zip Code: \_\_\_\_\_  
 Your Telephone No. \_\_\_\_\_  
 Represents  Self OR  Attorney for: \_\_\_\_\_  
 State Bar Number (if applicable): \_\_\_\_\_  
 Licensed Fiduciary No. (if applicable): \_\_\_\_\_

FOR CLERK'S USE ONLY

## SUPERIOR COURT OF ARIZONA IN MARICOPA COUNTY

In the Matter of the Conservatorship of \_\_\_\_\_

Case Number: PB \_\_\_\_\_

### ORDER OF APPOINTMENT OF A PERMANENT CONSERVATOR FOR A MINOR A.R.S. §14-5401

\_\_\_\_\_  
 Name(s) of Protected Minor(s)

**Warning: This appointment is not effective until the "Letters of Appointment" have been issued by the Clerk of the Superior Court.**

The Court has read the sworn "*Petition for Appointment of a Conservator*" and held a hearing to determine whether the Court should enter the Order requested in the Petition.

### THE COURT FINDS:

- A. Petitioner is entitled to file the Petition under Arizona law A.R.S. § 14-5404(A);
- B. Petitioner has given "*Notice of Hearing*" as required by law or "*Notice of Hearing*" was waived by all interested parties;
- C. Venue in this county is proper;

#### D. CONSERVATORSHIP:

1. The above-named person or persons to be protected are unmarried minors whose full name(s) and date(s) of birth are as follows:

Name	Date of Birth
_____	_____
_____	_____
_____	_____

2. Appointment of a conservator is necessary because the minor (whether one or more) owns money or property that requires management or protection which cannot otherwise be provided, may have business affairs which may be jeopardized or prevented by his or her minority, needs funds for his or her education, and protection is necessary or desirable to obtain or provide funds.
3. The person named below is eligible to serve as conservator under Arizona law.

**IT IS ORDERED:** (check the boxes that apply)

1. **The Court appoints:** \_\_\_\_\_  
as permanent conservator for the minor(s) to be protected named above.
2. **BOND:**  The Conservator must file a bond in the amount of \$ \_\_\_\_\_  
with the Clerk of the Court, Probate Registrar, by (date): \_\_\_\_\_  
**OR**  **Bond is not required.**
3. **TRAINING REQUIREMENTS:**  
**The Conservator shall complete the training for non-licensed fiduciaries specified by the Supreme Court of this state before Letters of Appointment are issued, OR**  
 **The training requirements for non-licensed fiduciaries are waived.**
4. **ISSUANCE OF LETTERS:**  
Upon filing of any required bond and declaration of completion of any required training, ***“Letters of Conservatorship for a Minor”*** shall be issued by the Clerk of the Court, Probate Registrar.
5.  **FUNDS:** The minor's funds are to be deposited in an interest bearing, federally insured, restricted account in a financial institution in this jurisdiction in the name of **"The Estate of (name of minor), a Minor, by (name of conservator), Conservator."**  
(For example: "The Estate of Joan Doe, a Minor, by John Smith, Conservator".)
6.  **RESTRICTED ACCOUNT:** No withdrawals of principal or interest may be made without a certified copy of an order of this Court authorizing the withdrawal.
7.  **REINVESTMENT:** Unless otherwise ordered by the court, reinvestment may be made without further court order so long as funds remain insured and restricted in this institution at this branch (**Arizona Rules of Probate Procedure, Rule 22 (C) 2**).
8.  **PROOF OF RESTRICTED ACCOUNT:** The conservator may only hold funds in a depository which agrees to be bound by the terms of this order and to make written proof of its agreement to be bound, including such proof of the account, the account number, the amount of the deposit, the notarized signature of the depository branch manager, and the agreement not to permit any withdrawal unless it is first provided with a certified copy of this Court's order permitting the withdrawal.
9.  **FILING PROOF OF RESTRICTED ACCOUNT:** The  conservator, the  attorney for the conservator,  attorney for the protected minor(s), or  the attorney for the insurance company, is responsible for establishing the restricted account and filing proof with the Court within **30** days of this order.
10.  **ESTABLISHING AN ANNUITY CONTRACT:** The conservator and/or counsel shall file with the Court proof of purchase of the annuity in the form of a copy of the annuity contract and proof of the carrier's agreement to abide by the terms of this Order within **thirty (30) days** of the issuance of this order.
11.  **ACCEPTANCE OF LETTERS:** The conservator shall sign the Acceptance of the Letters under oath or affirmation, and file the Acceptance with the Clerk of the Court, Probate Registrar.

**12. INVENTORY and CREDIT REPORT:**

Within **90** calendar days of this date, the Conservator must prepare and file with the Clerk of the Court a **detailed inventory** of the protected person’s assets indicating fair market value, as required by A.R.S. § 14-5418, and if obtainable, **attach to the inventory a copy of the protected person’s credit report that is dated within ninety days before the filing of the inventory,**

**OR**

**“Inventory” and Credit Report are waived** and are **not** required to be filed with the court.

**13. ANNUAL ACCOUNTING OF CONSERVATOR:**

The Conservator shall report to the Court on the administration of the protected person’s property by filing an annual accounting, and petitioning the court for approval of the accounting on or before the anniversary date of qualifying as conservator (the date of the **Letters of Appointment** as conservator as required by A.R.S. §14-5319.

**OR**

Annual Accounting **is waived** and is not required to be filed with the court.

**14. CHANGE OF ADDRESS:** The guardian and/or conservator shall immediately notify the court in writing of any change in his or her own address or that of any protected minor.

**15. OTHER DUTIES UNDER THE LAW:** The duties of the guardian and/or conservator required by Arizona law and as set forth in this Order and the Order of Instruction shall continue until the guardian and/or conservator is discharged from these duties by order of this court.

**DONE IN OPEN COURT:** \_\_\_\_\_

\_\_\_\_\_  
**Signature of Judicial Officer**

\_\_\_\_\_  
**Printed Name**

**NOTICE:** If the conservatorship needs to continue after the minor reaches the age of 18, in accord with Arizona law, A.R.S. § 14-5401 (B), a petition may be filed after the minor’s 17<sup>th</sup> birthday and before any court order for the termination of the present conservatorship, to continue the conservatorship for the now-adult protected person.