

AOC-856 Doc. Code: SET or
 Rev. 7-18 SETF
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 Commonwealth of Kentucky
 Court of Justice www.courts.ky.gov
 KRS 387.175; 387.710; 395.610-.657;
 395.990



PERIODIC/FINAL SETTLEMENT
 GUARDIAN OR CONSERVATOR FOR MINOR
 CONSERVATOR FOR DISABLED PERSON

Case No. _____
 Court _____ District _____
 County _____
 Division _____

NOTICE TO GUARDIAN OR CONSERVATOR FOR MINOR AND TO CONSERVATOR FOR DISABLED PERSON:

File this Settlement one (1) year after appointment and annually thereafter. If the net estate is \$5,000 or less, file this Settlement every two (2) years after the original report. (NOTE: YOU ARE NOT REQUIRED TO FILE THIS INVENTORY IF YOU ARE THE GUARDIAN FOR A DISABLED PERSON.)

IN RE: Estate of _____, a Minor under 18 Disabled Person.

Comes _____, appointed as Guardian Conservator of the above estate on _____, 2____. This Periodic Final Settlement indicates, by itemized statement and supported by receipts and vouchers, the assets received and disbursements made since the Inventory or last Settlement was filed. It is submitted pursuant to:

KRS 387.710 OR KRS 387.175, 395.610 - 395.657 and 395.990

ASSETS & INVESTMENTS

(Include anything of value to the estate including government benefits, Social Security and SSI pension plan benefits, savings and checking accounts, certificates of deposit, all personal property, rents from real estate, and proceeds from the sale of real estate and personal property. Attach additional sheets of paper if necessary).

| <u>ITEM</u> | <u>AMOUNT</u> |
|-------------------------------|-----------------|
| _____ | \$ _____ |
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |
| TOTAL ASSETS RECEIVED: | \$ _____ |

| <u>DISBURSEMENTS</u> | <u>AMOUNT</u> |
|----------------------------------|-----------------|
| _____ | \$ _____ |
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |
| TOTAL DISBURSEMENTS MADE: | \$ _____ |

BALANCE **ASSETS LESS DISBURSEMENTS: \$ _____**

For Periodic Settlements - carry balance forward to next report.
 For Final Settlements - indicate to whom balance was paid and attach receipt.

IN PERIODIC SETTLEMENTS:

PLAN FOR PRESERVING AND MAINTAINING ESTATE *(not to be filled out if estate has net value of \$5,000 or less)*

IN FINAL SETTLEMENTS:

UNPAID CREDITORS - ALLOWED CLAIMS

AMOUNT

| | | |
|-------|--------------|----------|
| _____ | \$ | _____ |
| _____ | | _____ |
| _____ | | _____ |
| _____ | | _____ |
| _____ | | _____ |
| _____ | | _____ |
| | TOTAL | \$ _____ |

CREDITORS - DISALLOWED CLAIMS

AMOUNT

| | | |
|-------|--------------|----------|
| _____ | \$ | _____ |
| _____ | | _____ |
| _____ | | _____ |
| _____ | | _____ |
| _____ | | _____ |
| _____ | | _____ |
| | TOTAL | \$ _____ |

Above-named Guardian/Conservator submits this Settlement to the Court, and if a Final Settlement, asks that the Surety be discharged.

Date

Guardian/Conservator Signature

Guardian's/Conservator's Phone Number

Address

Subscribed and sworn before me on _____, 2_____. My commission expires: _____,
2_____.

Name/Title