

SIMPLIFIED ACCOUNTING QUESTIONNAIRE

Liquid Assets Less Than \$20,000

(complete all questions – if not applicable, write N/A and submit to the County Clerk)

Attach extra sheets as needed

GUARDIAN:

Name _____

Address _____

Telephone _____

INCAPACITATED PERSON:

Name _____

Living ____ Deceased ____ Date _____

Address _____

Telephone _____

1. What was the total value of the Incapacitated Person's estate at the time the Guardianship /Conservatorship /Committee was established?

CASH _____

SECURITIES _____

REAL ESTATE _____

OTHER _____

TOTAL _____

2. What is the present value of the Incapacitated Person's estate (attach copies of the last statement from the financial institution where held)?

CASH _____

SECURITIES _____

REAL ESTATE _____

OTHER _____

TOTAL _____

3. Is there a bond? No ____ Yes ____ Amount _____
Name _____
Address _____
Telephone _____

4. What is / was the Incapacitated Person's total monthly income?

SOCIAL SECURITY _____
PENSION _____
VETERAN'S PENSION _____
OTHER _____
TOTAL _____

5. What is / was the total amount of the IP's monthly expenses? _____

6. Do you request commissions? Yes ____ No ____

Please send a copy of the Death Certificate if applicable.

STATE OF NEW YORK

COUNTY OF _____ ss.:

_____ (Guardian), being duly sworn says:

I am the Guardian of the Person and / or Property for the above named Incapacitated Person. The foregoing account and inventory contains, to the best of my knowledge and belief, a full and true statement of all my receipts and disbursements on account of said Incapacitated Person; and of all money and other personal property of said person which have come to my hands or have been received by any other persons by my order or authority since my appointment or since filing my last annual account and inventory, and of the value of all such property, together with a full and true statement and account of the manner in which I have disposed of the same and of all property remaining in my hands at the time of filing this account and inventory; also a full and true description of the amount and nature of each investment made by me since my appointment or since the filing of my last account and inventory.

I do not know of any error or omission in the account and inventory to the prejudice of said person.

Guardian

Sworn to before me this

_____ day of _____, 20_____

Notary Public