

👉 NOTICE: Availability of Forms 👉

You have selected forms which have been approved for filing a Conservator's Accounting and/or Inventory under Idaho Code Section 15-5-418 and 15-5-419. The following three forms are available:

- CAO GC 9-1 Conservator's Inventory and Financial Plan
- CAO GC 9-2 Conservator's Accounting
- CAO GC 9-3 Conservator's Accounting for Small Estates

These forms were developed and approved by the Idaho Supreme Court's Guardianship/Conservatorship Committee as part of an ongoing effort to increase guardian and conservator compliance with the requirements to file an inventory and periodic accounting for estates under their supervision and control.

The Conservator's Inventory and Financial Plan combines the conservator's inventory with the financial plan required under I.C. § 15-5-404. Both documents are due 90 days after filing the petition. The financial plan is designed to guide the conservator through a budget process and provides the court with plans on how the conservator will manage the person under conservatorship's finances. The inventory is a snapshot of the person under conservatorship's estate at the time the conservator was appointed.

The next two forms are for a conservator's accounting required by I.C. § 15-5-419. The longer form contains all of the financial information required by statute. The shorter version covers less information for when the estate is less than \$50,000.

At this time, there are no written instructions on the use of these forms. You may be able to obtain additional assistance by contacting the court clerk's office in the county where the court file for the estate is located.