

**Private Information Record
in Guardianship and Conservatorship cases**

Utah Rule of Judicial Administration 6-501 requires you to complete this form and file it with the court before your appointment.

Additionally, you must keep the court informed of both your and the protected person's current address and phone number. You may notify the court by calling _____. Please have your case number ready. Or you can print the information in the space below and mail it to the court at:

_____.

_____.
Case Number

Information About Guardian/Conservator

Information About Protected Person

Name

Name

Address

Address

City, State, Zip

City, State, Zip

Phone

Phone

Email

Email

Social Security Number

Social Security Number

Date of Birth

Date of Birth

Driver License Number

Driver License Number

Please list your next of kin or other contact person who will know who to reach you.

Contact Person's Name

Address

City, State, Zip

Phone

Email

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If the Protected Persons include school age children, please list the school they will be attending.

Child's Name	School Name

I declare under criminal penalty under the law of Utah that everything stated in this document is true.

Signed at _____ (city, and state or country).

Date

Signature ► _____

Printed Name _____

Summary of What is Expected of Guardians and Conservators

This summary is only a summary. For more information about your responsibilities and forms, please visit the court's website at <http://www.utcourts.gov/howto/family/gc/>.

1. Duties to the Court

a. What you must do:

- Notify the court if you or the protected person move.
- File a "status report" every year within 60 days after the anniversary of your appointment. (guardian only)
- File a financial accounting every year within 60 days after the anniversary of your appointment.
- File an inventory of the estate within 90 days after your appointment.
- File a final accounting when the guardianship or conservatorship ends.
- Notify the court if the protected person dies or no longer needs a guardian or conservator.

2. Duties to the Protected Person

a. What you must do:

- Make the decisions that the protected person would make, unless that decision would cause harm.

b. What you must not do:

- Mix your personal or business money and property with the protected person's money and property.
- Use the protected person's money or property for the benefit of anyone other than the protected person.
- Abuse, neglect or isolate the protected person.

c. What the guardian may do (unless the court's order limits your authority):

- Make decisions for the protected person about:
 - health care or other service;
 - custody and residence;
 - care, comfort, and maintenance;
 - training and education; and
 - clothing, furniture, vehicles and personal effects.

d. What the conservator — or guardian if there is no conservator — must do:

- Identify, locate and control the protected person's estate.
- Collect money owed to the protected person, including income and benefits, and start legal proceedings if needed.
- Manage the protected person's estate to so that needs are met throughout his or her expected life.
- Pay taxes, expenses and debts owed by the protected person.

e. What the conservator may do:

- Make the gifts and donations that the protected person would make.
- Invest the protected person's money and property.

3. Duties to Interested Persons

a. What you must do:

- Notify the interested persons of your appointment right away; notify others as needed.
- Notify the interested persons if the protected person dies or no longer needs a guardian or conservator.