

In the Justice Court of Utah

\_\_\_\_\_ Judicial District \_\_\_\_\_ County

Court Address \_\_\_\_\_

### Rights and Instructions Form

Prosecution \_\_\_\_\_

v. \_\_\_\_\_

Defendant \_\_\_\_\_

Case Number \_\_\_\_\_

Judge \_\_\_\_\_

### Your Rights

You have rights and choices in your criminal case.

1. You can have a lawyer help you at every step in your case. You can ask to delay your case for a short time so that you have time to find a lawyer. (URCrP 8, Utah Code 78B-22-201)
2. You can ask the court for a public defender. A public defender is a lawyer who will help you for free. The court will give you a public defender if:
  - you don't have money to pay a lawyer based on the guidelines in Utah Code 78B-22-202; and
  - you are at risk of going to jail.

If you want to use the public defender, please ask for and fill out the Declaration of Financial Status (Criminal) before you see the judge today.

At the end of the case, you could be required to pay a fee for your public defender. The amount you have to pay will be based on your ability to pay if you are found guilty, or if you plead guilty or no contest. (Current fees for public defender services range from \$50 to \$250.) (Utah Code 76-3-201(4)(e) and 77-32b-1(a)).

3. You can defend yourself. There can be disadvantages to defending yourself. If you defend yourself, the court cannot tell you what to do in your case. You will have to follow complicated legal rules.
4. The court will give you a speedy public trial. You have two options for who will decide your case

**Commented [NP1]:** I suggest deleting this. We should only provide information if we can keep it current and accurate. It will be challenging to keep these rates current

- a neutral jury of your peers; or
- the judge.

If you want a jury trial, you must ask for one in writing at least 14 days before your trial. You can only have a jury trial if you are at risk of going to jail. (URCrP 17)

5. When witnesses testify against you, you can:

- see them face-to-face, and
- ask them questions about what they said.  
(Utah Code 77-1-6)

6. You can also have witnesses testify for you. You can require witnesses to come to court if you serve them with an order to attend (a subpoena). If you can't afford to pay for your witnesses to come to court, the government will pay those costs.  
(Utah Code 77-1-6)

7. You can testify for yourself, but no one can make you testify. You do not have to do or say anything that would indicate you were involved in a crime. Your choice not to testify cannot be held against you.

8. You are considered innocent until:

- you plead guilty or no contest; or
- you are proven guilty in court.

The prosecution must prove each part of the crime beyond a reasonable doubt. Each member of a jury must agree on the jury's decision. (Utah Code 76-1-501 and 78B-1-104)

9. You can post bail. This means you or someone else can deposit money with the court to release you from jail. If you post bail, you will be released from jail but will be required to:

- appear in court for future hearings, and
- do anything else the court requires.

If you want to change the bail amount you must file a motion. (Utah Code 77-20-201, 77-20-401, 77-20-205, and 77-20-207)

10. You will receive a written explanation of what crimes you are accused of committing. The accusation is called a "charge." The written explanation is called a "charging document" or "Information." It is filed by the prosecution.

11. You can see the information from the prosecutor's file regarding your case. This includes written or recorded statements of witnesses and other potential evidence. If you plead guilty or no contest without first receiving or requesting that information from the prosecutor, you will not be allowed see the information from the prosecutor's file. (URCrP 16.)

## **Responding to the Charges (Entering a Plea)**

You can tell the court how you want to respond to the charges. Your response is called a "plea." If you want, you can talk to a lawyer before entering your plea. You have 3 main plea options:

- 1) **Not Guilty.** You do not admit the charges against you. You would like:
  - a trial on the matter or
  - before trial, to talk about the charge with the prosecutor to explain your side of the case.
- 2) **Guilty.** You admit you committed each part of the charge. You admit you violated the law as stated in the charge. If you enter a plea of guilty, you may give an explanation to the court before sentencing.
- 3) **No Contest.** You do not challenge the charge before the court. A plea of no contest has the same effect as a guilty plea. You could be sentenced in the same way as if you had entered a guilty plea.  
(URCrP 11)

In some cases, people have an option to enter a plea in abeyance. A plea in abeyance means you plead "guilty" or "no contest" to the charges; you have that plea held in abeyance for up to one year; you complete the conditions of a plea in abeyance agreement; and you have the charges dismissed after the abeyance period, so that there is no conviction on your record.

A guilty or no contest plea becomes permanent:

- After you are sentenced and
- 28 days after you are sentenced and can no longer appeal your case

Do NOT enter a plea of guilty or no contest unless you are actually guilty of the charges or you would be found guilty if you went to trial.

If you want to cancel or withdraw your plea of guilty or no-contest, you must file a Motion to Withdraw Plea. You must file your motion before you are sentenced or within 30 days of a plea in abeyance. In your motion, you must show that your plea was not made knowingly and voluntarily. (Utah Code 77-13-6)

### Appeal

If you choose to appeal your conviction or sentence, you must file a written Notice of Appeal within 30 days of the sentence or order from which you are appealing. (URAP 3 and 4)

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### Penalties and Sentencing if You Are Found Guilty or Plead Guilty or No Contest

Class of crime	Jail time	Fines and surcharges (plus interest)
Class B Misdemeanor	Up to 6 months	Up to \$1,950
Class C Misdemeanor	Up to 90 days	Up to \$1,062.50
Infraction	No jail	Up to \$1,062.50

(Utah Code 76-3-204 and 205, 76-3-301)

There could be other charges, including:

- Restitution – you could be required to pay the victim for their loss.
- Costs of probation.  
(Utah Code 77-38b-205 and 77-18-105)

You can ask to pay a fine by doing community service. The judge will decide whether to grant your request. Each hour of service would be worth \$10. (Utah Code 76-3-301.7)

You have options about when the court sentences you. You can be sentenced:

- the same day you enter a guilty or no contest plea to avoid another day in court.
- anywhere from 2 to 45 days after your plea. The court will always accommodate your request for a later sentencing date.  
(URCrP 22)

When the court sentences you:

- it does not have to follow the sentencing recommendations from the prosecutor.
- it may order your jail sentence to run one after the other (consecutively) or at the same time (concurrently) with the sentences in this case and with any other case.  
(Utah Code 76-3-201 and 76-3-401)

#### **Immigration Consequences if you are not a U.S. Citizen**

If you are not a U.S. citizen, pleading guilty or no contest to some charges could affect your immigration status.

#### **Gun (2<sup>nd</sup> Amendment) Rights in Cases Involving Domestic Violence**

If your case involves domestic violence and one of the elements of the charge is:

- the use or attempted use of physical force or
- the threatened use of a deadly weapon,

then you will not be allowed to possess or purchase any firearms if you are convicted or enter a plea of guilty or no contest. You might want to talk with a lawyer if you are worried about how a possible plea could affect your 2nd Amendment rights. (Utah Code 76-10-503)

#### **Right to Counsel – Waiver of Counsel**

I understand that:

- I can talk with a lawyer before entering a plea to my criminal charges and during each step of my criminal case.
- If it is possible that I could go to jail, the court may appoint a lawyer for me for free if I cannot afford a lawyer.
- if I decide to represent myself, but later want a lawyer to help me, I can ask the court to appoint a lawyer for me or give me the chance to hire my own, but I must ask for this at least 10 days before trial.

I also understand that:

- a trained lawyer can probably defend me much better than I could.
- court cases use complicated and technical rules of evidence and criminal procedure. These rules are hard to understand and use effectively without study

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and practice. The court cannot break the rules of evidence and criminal procedure just because I may not be aware of these rules or how they work.

- a lawyer is trained to encourage the court to be flexible and fair when it is considering my case.
- a lawyer can help me understand how to defend my case. This includes legal strategies, how to use my rights listed above, and how to use mitigating factors in my case.
- the court (the judge) is not my lawyer and cannot and will not give me legal advice.
- the prosecutor is also not my lawyer. Instead, the prosecutor is the lawyer for the government that is charging me with having committed a crime.
- entering a plea or being found guilty could have consequences beyond this case. Consequences could include things like losing my driving privileges, causing me to lose my job or affecting my ability to find a job, and affecting my immigration status. A lawyer can help me think about these possible consequences.

I have read (or someone has read to me) these rights and instructions. I understand all of them. I understand the charges and the possible penalties. Any plea I enter is voluntary and of my own free will and choice, and I will tell the judge if this is not true. No force, threats or unlawful influence have been made to get me to plead in any way, and I will tell the judge if this is not true. If I tell the judge I do not want a lawyer to represent me, I am voluntarily, knowingly, and intelligently waiving my right to a lawyer. This means I am proceeding by representing myself without legal representation. I understand that I can always change my mind before sentencing. I can ask for a lawyer at any time before sentencing if I decide that I do want a lawyer.

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

**Attorney or Licensed Paralegal Practitioner of record** (if applicable)

\_\_\_\_\_  
Date  
Signature ►  
Printed Name

**Commented [NP4]:** The original form does not have a place for the attorney to sign. Should we add one?

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In the District Court of Utah

\_\_\_\_\_ Judicial District \_\_\_\_\_ County

Court Address \_\_\_\_\_

---

Plaintiff

v.

---

Defendant

**Order of Eviction and Notice That  
You Must Move  
(Order of Restitution)**

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Case Number

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Judge

To the defendants:

You are ordered to move out of \_\_\_\_\_ (address).

You must move out within 3 calendar days of when this Order was served on you, or by  
: \_\_\_\_\_ (time) on \_\_\_\_\_ (date), whichever date is later.

Move out means leave the premises, take all your belongings and leave any keys or access cards. You and any person claiming a right to live there from you must move out and allow the plaintiff to have access to and control of the premises.

If you do not follow this order, you may be forcibly removed from the property by the sheriff or a constable. They will use the least destructive means possible to remove you, your personal property, and any persons who claim to have received a right to live there from you.

**To the sheriff or constable:**

If the defendants are served with this order and fail to vacate the property as ordered, you are ordered to enter the premises by force using the least destructive means possible to remove the defendants, any personal property of the defendants and any persons claiming a right to occupancy from the defendants.

Judge's signature may instead appear at the top of the first page of this document.

\_\_\_\_\_  
Date

Signature ► \_\_\_\_\_  
Judge  
\_\_\_\_\_

## Notice to Defendant

### Your options

Move out. Take your important documents, medicine, medical supplies, and cherished objects.

Try to work something out with your landlord.

If you want to ask the court to stop the eviction you can file both of these:

- a Motion to Set Aside Judgment. This asks the court to undo the eviction order. The court must wait 14 days before it can rule on the motion unless you ask the court to delay enforcement of the order.
- a Motion to Delay Enforcement of Judgment. This asks the court to delay the eviction order. The eviction could still move forward unless you ask the court to set aside the eviction order. But the court cannot grant the motion to delay unless you post a bond for a large enough amount to pay the landlord's probable costs, attorney fees, and damages (including unpaid rent) if the court decides in favor of the landlord. Any prepaid rent is a portion of the tenant's bond.

You can find forms and guidance at [www.utcourts.gov/out](http://www.utcourts.gov/out) [We will also add a QR code]

If you do not know where you will be able to stay, call 211 on your phone for help in your county.

### Even though you are being evicted, you still have rights

Even though you must move, you can still do the following things. You can require your landlord to give you the following property back within **5 business days**, without paying anything:

- clothing
- identification
- financial documents, including all those related to your immigration or employment status
- documents about the receipt of public services, and
- medical information, prescription medications, and any medical equipment required for maintenance of medical needs

You can get your other belongings back, but you must make a written request to your landlord within **15 calendar days** after your eviction. Your landlord can charge you a reasonable storage and moving fee.

If you are not able to get your belongings as explained above, you can ask for a hearing in front of a judge. The hearing would be to talk about problems with getting your belongings. To ask for a hearing, file a form called “Request for Hearing After Eviction Because My Rights are Being Violated.” The landlord must have the sheriff or constable serve this form with you along with this order. Your request for a hearing will not stop the eviction.

### **Update the court and the landlord with your contact information**

The landlord could file paperwork in your case asking for a money judgment and could file paperwork asking to increase the judgment amount. Update your contact information so you will receive what is being filed and have the opportunity to respond.



\_\_\_\_\_  
Name

\_\_\_\_\_  
Address

\_\_\_\_\_  
City, State, Zip

\_\_\_\_\_  
Phone

\_\_\_\_\_  
Email

**Check your email.** You will receive information and documents at this email address.

I am ☐ Petitioner ☐ Respondent  
☐ Petitioner's Attorney ☐ Respondent's Attorney (Utah Bar #: \_\_\_\_\_)  
☐ Petitioner's Licensed Paralegal Practitioner  
☐ Respondent's Licensed Paralegal Practitioner (Utah Bar #: \_\_\_\_\_)

In the District Court of Utah

\_\_\_\_\_ Judicial District \_\_\_\_\_ County

Court Address \_\_\_\_\_

In the Matter of (select one)

- ☐ the Marriage of (for a divorce with or without children, annulment, separate maintenance, or temporary separation case)
- ☐ the Children of (to establish custody, parent-time or child support)
- ☐ the Parentage of the Children of (for a paternity case)

\_\_\_\_\_  
(name of Petitioner)

and

\_\_\_\_\_  
(name of Respondent)

\_\_\_\_\_  
Other parties (if any)

**Notice of Disclosure Requirements  
in Domestic Relations Cases**

(Utah Rule of Civil Procedure 26.1)

\_\_\_\_\_  
Case Number

\_\_\_\_\_  
Judge

\_\_\_\_\_  
Commissioner

1. We are involved in one of these cases:

- divorce.
- separate maintenance.
- temporary separation.
- Parentage.

- child custody.
- child support.
- domestic order modification.

2. We must give each other ("disclose") the following documents:

- **Initial Disclosures.** (The court-approved Initial Disclosures form is available at [www.utcourts.gov](http://www.utcourts.gov).)
- **Financial Declaration and required attachments.** (The court-approved Financial Declaration form is available at [www.utcourts.gov](http://www.utcourts.gov).)
  - Documents verifying the amounts for every item listed in the Financial Declaration (excluding monthly expenses).
  - Federal and state income **tax returns** for the **past two tax years** before the petition in this case was filed. If you don't have these, contact the IRS or the State Tax Commission.
  - **Pay stubs** and other evidence of income for the **past 12 months**.
  - All loan applications and financial statements from the 12 months before the petition was filed.
  - Documents verifying the value of all real estate in which you have an interest. This includes the most recent appraisal, tax valuation, and refinance documents.
  - All statements for the **3 months** before the petition was filed for all financial accounts. This includes, but is not limited to, checking, savings, credit cards, money transfer apps, money market funds, certificates of deposit, brokerage, investment, and retirement.
  - If you do not have some of the above documents, you may estimate the amounts. You must explain on the Financial Declaration how you chose the estimated amount and why the documents are not available.

Commented [KT1]: Add QR code and short url

Commented [KT2]: Add QR code and short url

We do not have to disclose all of the information above if our case does not involve dividing property or other valuables. This could include paternity, modification, and grandparents' rights cases. If we are not dividing property or other valuables in our case we must only serve:

- each of our three most recent paystubs and the previous year tax return;
- if one of us is self-employed, that person must serve six months of bank and profit and loss statements; and
- proof of any other assets or income relevant to the calculation of child support.

The court may require each of us to complete a full Financial Declaration for any reason. Either of us can ask the other person to fill out a complete Financial Declaration. If we need help, we can ask the court at the case management conference.

2. Within 14 days after the answer is filed we must send to one another our Financial Declarations and all required attachments.
3. If either of us do not disclose all assets and income in the Financial Declaration and attachments, that person may be subject to sanctions. (Utah Rule of Civil Procedure 37). Sanctions may include awarding assets to the other person, requiring you to pay the other person's attorney's fees, or other sanctions decided by the court.
4. If we agree to settle all the terms of your case, we may not have to send the Initial Disclosures form and the Financial Declaration.

#### Certificate of Service

I certify that I filed with the court and am serving a copy of this Notice of Disclosure Requirements in Domestic Relations Cases on the following people.

Person's Name	Service Method	Service Address	Service Date
	<input type="checkbox"/> Mail <input type="checkbox"/> Hand Delivery <input type="checkbox"/> E-filed <input type="checkbox"/> Email <input type="checkbox"/> Left at business (With person in charge or in receptacle for deliveries.) <input type="checkbox"/> Left at home (With person of suitable age and discretion residing there.)		
	<input type="checkbox"/> Mail <input type="checkbox"/> Hand Delivery <input type="checkbox"/> E-filed <input type="checkbox"/> Email <input type="checkbox"/> Left at business (With person in charge or in receptacle for deliveries.) <input type="checkbox"/> Left at home (With person of suitable age and discretion residing there.)		
	<input type="checkbox"/> Mail <input type="checkbox"/> Hand Delivery <input type="checkbox"/> E-filed <input type="checkbox"/> Email <input type="checkbox"/> Left at business (With person in charge or in receptacle for deliveries.) <input type="checkbox"/> Left at home (With person of suitable age and discretion residing there.)		

Signature ►

### **Certificate of Service**

I certify that I filed with the court and am serving a copy of this Notice of Disclosure Requirements in Domestic Relations Cases on the following people.

Person's Name	Service Method	Service Address	Service Date
---------------	----------------	-----------------	--------------

Date

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

\_\_\_\_\_  
Name

\_\_\_\_\_  
Address

\_\_\_\_\_  
City, State, Zip

\_\_\_\_\_  
Phone

\_\_\_\_\_  
Email

**Check your email.** You will receive information and documents at this email address.

I am: \_\_\_\_\_ Guardian \_\_\_\_\_ Guardian's Attorney, Utah Bar #: \_\_\_\_\_  
(mark all that apply) \_\_\_\_\_ Conservator \_\_\_\_\_ Conservator's Attorney, Utah Bar #: \_\_\_\_\_

In the District Court of Utah

\_\_\_\_\_  
Judicial District \_\_\_\_\_ County

Court Address: \_\_\_\_\_

In the Matter of:	<b>Inventory Report</b> (Utah Code Section 75-5-418)
Protected Person	Case Number _____ Judge _____

**Contact information:**

Guardian or Conservator	Protected Person
Name: _____	Name: _____
Address: _____	Address: _____
Phone: _____	Phone: _____
Email: _____	Email: _____

1. I was appointed as guardian or conservator on \_\_\_\_\_  
Date of Appointment

**2. Income and Expenses**

<b>Worksheet A – Income</b> money the protected person receives	
	\$
Wages (before taxes)	
Interest Earned	
Dividends	
Social Security	
Annuities	
Insurance	
Real Estate Sold	
Stocks/Bonds Sold	
Money owed & received	
Miscellaneous Property Sold	
Inheritance	
Trust funds	
Other (describe)	
Total \$	

(list the Income total on Balance Summary in paragraph 4, Line 1)

<b>Worksheet B – Expenses</b> costs of goods and services for the protected person	
	\$
Mortgage/Rent	
Utilities	
Home Maintenance	
Home Improvement	
Home Furnishings	
Health Care	
Food	
Education	
Clothes	
Personal Effects	
Activities	
Transportation	
Taxes	
Conservator Services	
Guardian Services	
Other Professional Services	
Court Fees	
Other (describe)	
Total \$	

(list the Expenses total on Balance Summary in paragraph 4, Line 2)

### 3. Assets, Investments, Trusts, Debts, and Liabilities

<b>Worksheet C: Assets</b> resources, items, and/or property owned by the protected person Each item of property is valued as of the date of the appointment order, using the cash value of the item where possible. <i>You must attach bank and account statements, tax assessments, and other supporting documents</i>		
		Current Value Amount
<b>Cash Accounts</b>	Checking account: (list bank name)	

	Savings account: (list bank name)	
	Other (describe)	
<b>Real Estate</b>	Home (residence)	
	Real estate (not residence)	
	Other (describe)	
<b>Investments</b>	Certificates of deposit	
	Money market account	
	Bonds	
	Mutual funds	
	Individual stock shares	
	Retirement account	
	Other (describe)	
<b>Property</b>	Vehicles	
	Jewelry	
	Furniture	
	Electronics	
	Other (describe)	
<b>Other</b>	Life insurance (cash value)	
	Money owed to the protected person, not yet paid	
	Other (describe)	
<b>Total \$</b>		

(list the Assets total on Balance Summary in paragraph 4, Line 3)

<b>Worksheet D – Investments and Trusts</b> held for the protected person's benefit <i>You must attach account statements and other supporting documents.</i>	
	Current Balance or Value Amount
Certificates of deposit	

Money market account	
Bonds	
Mutual funds	
Individual stock shares	
Retirement account	
Trust: (list name of trust)	
Other (describe)	
<b>Total \$</b>	

(list the Investments and Trusts totals on Balance Summary in paragraph 4, line 4)

Worksheet E: Debts and Liabilities		
<p>Money owed or a financial obligation of the protected person. Expenses are different from debts. For example, a monthly mortgage payment is an expense, the full amount owed on the mortgage is a debt</p> <p><i>You must attach bank and account statements, tax assessments, and other supporting documents</i></p>		
		Current Owed Amount
<b>Real Estate Loans</b>	Mortgage Loan	
	Home equity loan	
	Other (describe)	
<b>Other Loans</b>	Car loans	
	Student loans	
	Other (describe)	
<b>Debts</b>	Credit card: (list bank name)	
	Credit card: (list bank name)	
	Other (describe)	



	<b>Total \$</b>	

(list the Debts and Liabilities total on Balance Summary in paragraph 4, Line 5)

#### 4. Balance Summary

The amounts below should match the totals in Worksheets A-E above.

Income and Expenses			
Line	Worksheet	Category	Amount
1	A	Income	
2	B	Expenses	-
			(subtract Line 2 from Line 1)
<b>Total \$</b>			

Assets, Investments, Trusts, Debts, and Liabilities			
Line	Worksheet	Category	Amount
3	C	Assets	
4	D	Investments and Trusts	
5	E	Debts and Liabilities	
			(add lines 3 and 4, subtract Line 5 for Total)
<b>Total \$</b>			

5. I valued each asset as of the date I was appointed guardian or conservator using the cash value of the item where possible.
6. This is a complete inventory of the protected person's income, expenses, assets, and liabilities, to the best of my knowledge.
7. I am filing this Inventory Report along with the following (forms can be found at: <https://www.utcourts.gov/howto/family/gc/reports.html>):
  - All bank and account statements, tax assessments, and other supporting documentation,
  - Notice of Right to Object, and
  - Guardian and Conservator Certificate of Mailing.

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

\_\_\_\_\_ Sign here ► \_\_\_\_\_  
Date  
Typed or Printed Name \_\_\_\_\_

\_\_\_\_\_  
Name

\_\_\_\_\_  
Address

\_\_\_\_\_  
City, State, Zip

\_\_\_\_\_  
Phone

**Check your email.** You will receive information and documents at this email address.

\_\_\_\_\_  
Email

I am:    ☐ Guardian    ☐ Guardian's Attorney,    Utah Bar #: \_\_\_\_\_  
(mark all that apply)    ☐ Conservator    ☐ Conservator's Attorney,    Utah Bar #: \_\_\_\_\_

In the District Court of Utah

\_\_\_\_\_  
Judicial District    \_\_\_\_\_ County

Court Address: \_\_\_\_\_

In the Matter of:

☐ **Guardian Financial Accounting to the  
Conservator (Adult)** (Utah Code 75-5-312)

☐ **Guardian or Conservator Financial  
Accounting to the Court (Adult)**  
(Utah Code 75-5-312 and 75-5-419)

Protected Person

Case Number

Judge

**Contact information:**

\_\_\_\_\_  
Guardian or Conservator

\_\_\_\_\_  
Protected Person

Name: \_\_\_\_\_

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

Email: \_\_\_\_\_

1. This financial accounting covers the following period (List dates. Each report covers 365 days. The first report should start the day the guardian was appointed.):

from \_\_\_\_\_ to \_\_\_\_\_

2. Report Status (choose one):

☐

This is my first financial accounting report.

☐

This is my next financial accounting. My previous report covered from:

\_\_\_\_\_ (start date) \_\_\_\_\_ (end date)

☐

This is my final financial accounting report (Explain. A final report is required if the guardian or conservator is no longer serving in that role, the protected person dies, the court ends the guardianship or conservatorship or the court transfers the guardianship or conservatorship to another state):

\_\_\_\_\_

3. Money I received for guardian or conservator services. (Choose one. The court must give you permission to be paid for providing guardianship or conservatorship services. Utah Code 75-5-312):

☐

**None.** The protected person does not owe me any money.

☐

**Unpaid.** The protected person owes me: \$ \_\_\_\_\_

☐

**Partial.** I received: \$ \_\_\_\_\_ ; I am still owed: \$ \_\_\_\_\_

☐

**Paid in Full.** I received: \$ \_\_\_\_\_  
The protected person does not owe any additional money.

4. As guardian or conservator, I loaned money to the protected person (choose one):

☐

**No.**

☐

**Yes.** I loaned: \$ \_\_\_\_\_ ; I am still owed: \$ \_\_\_\_\_

5. While serving as guardian or conservator, I (choose all that apply):

**Commented [KT1]:** These boxes will be replaced with check boxes. These are built into a table and I will need to reconfigure each table to do this.

<input type="checkbox"/>	<b>Did not</b> serve as a paid caregiver for the protected person.
<input type="checkbox"/>	<b>Did</b> serve as a paid caregiver for the protected person. I received: \$ _____
<input type="checkbox"/>	<b>Did</b> receive other payments, in the following amount: \$ _____

Provide a detailed explanation for payments received (Attach supporting documents, if applicable):

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6. There is an estate plan to guide investment and distribution (choose one):

<input type="checkbox"/>	No.
<input type="checkbox"/>	Yes - the plan is on file with the court.
<input type="checkbox"/>	Yes - the plan is being submitted along with this report.

## 7. Income and Expenses

Worksheet A – Income money the protected person received during the reporting period		Worksheet B – Expenses costs of goods and services on the protected person's behalf during the reporting period	
	\$ Amount		\$ Amount
Wages		Mortgage or Rent	
Interest <b>Earned</b>		Utilities	
Dividends		Home Maintenance	
Social Security		Home Improvement	
Annuities		Home Furnishings	
Insurance		Health Care	
Real Estate Sold		Food	
Stocks or Bonds Sold		Education	
Money owed and received		Clothes	
Other Property Sold		Personal Effects	
Inheritance		Activities	
Trust funds		Transportation	
Other (describe)		Taxes	
		Conservator Services	

Commented [KT2]: Make amount columns the same size

Total \$	

(list the Income total on Balance Summary in paragraph 11, Line 1)

Guardian Services	
Other Professional Services	
Court Fees	
Other (describe)	
Total \$	

(list the Expenses total on Balance Summary in paragraph 11, Line 2)

8. If any expense listed on Worksheet B is past due or not paid in full, please describe:

**Commented [KT3]:** These boxes will be replaced with blank lines once the table is reconfigured.

9. Were any of the protected person's funds used for the benefit of anyone other than the protected person? If so, describe:

#### 10. Assets, Investments, Trusts, Debts, and Liabilities

Worksheet C – Assets				
resources, items, and/or property owned by the protected person				
Starting Balance or Value refers to the asset's worth at the start of the reporting period. It should match the ending balance or value from the previous reporting period.				
Gain/Loss Amount refers to an increase or decrease in the value of the asset during the reporting period. Include a minus sign (–) with the number if the amount is a decrease in the value of the asset.				
Ending Balance or Value is the difference between the Starting Balance or Value and the Gain/Loss amount. The ending balance or value may be higher if the asset increased in value, or lower if the asset lost value. It may also be the same if the asset value did not change during the reporting period.				
<i>You must attach bank and account statements, tax assessments, and other supporting documents.</i>				
		Starting Balance or Value	Gain / Loss Amount	Ending Balance or Value
<b>Cash Accounts</b>	Checking account: (list bank name)			
	Savings account: (list bank name)			
	Other (describe)			

<b>Real Estate</b>	Home (residence)			
	Real estate (not residence)			
	Other (describe)			
<b>Property</b>	Vehicles			
	Jewelry			
	Furniture			
	Electronics			
	Other (describe)			
<b>Other</b>	Life insurance (cash value)			
	Money owed to the protected person, not yet paid			
	Other (describe)			
<b>Total \$</b>				

(list the Assets totals on Balance Summary in paragraph 11, line 3)

#### Worksheet D – Investments and Trusts

held for the protected person's benefit

Starting Balance or Value refers to the worth of the investments or trusts at the start of the reporting period. It should match the ending balance or value from the previous reporting period.

Gain/Loss Amount refers to an increase or decrease in the value of the investments or trusts during the reporting period. Include a minus sign (–) with the number if the amount is a decrease in the value of the investments or trusts.

Ending Balance or Value is the difference between the Starting Balance or Value and the Gain/Loss amount. The ending balance or value may be higher if the investments or trusts increased in value, or lower if the investments or trusts lost value. It may also be the same if the value of the investments or trusts did not change during the reporting period.

*You must attach account statements and other supporting documents.*

	Starting Balance or Value	Gain / Loss Amount	Ending Balance or Value
Certificates of deposit			
Money market account			
Bonds			
Mutual funds			
Individual stock shares			
Retirement account			
Trust: (list name of trust)			
Other (describe)			
<b>Total \$</b>			

(list the Investments and Trusts totals on Balance Summary in paragraph 11, line 4)

### Worksheet E – Debts and Liabilities

Money owed or a financial obligation of the protected person. Expenses are different from debts. For example, a monthly mortgage payment is an expense, the full amount owed on the mortgage is a debt

Starting balance refers to the full amount owed at the start of the reporting period. It should match the ending balance from the previous reporting period.

Gain/Loss amount refers to an increase or decrease in the debt amount during the reporting period. Include a minus sign (–) with the number if the amount is a decrease in the debt amount.

Ending Balance is the difference between the starting balance and the Gain/Loss amount. The ending balance may be higher if the debt increased (e.g. interest accrued). It may be lower if the debt decreased (e.g. payments toward the debt principal). It may also be the same if the debt amount did not change during the reporting period.

*You must attach bank and account statements, tax assessments, and other supporting documents.*

		Starting Balance	Gain / Loss Amount	Ending Balance
<b>Real Estate Loans</b>	Mortgage loan			
	Home equity loan			
	Other (describe)			
<b>Other Loans</b>	Car loan			
	Student loans			
	Other (describe)			
<b>Debts</b>	Credit card: (list bank name)			



	Credit card: (list bank name)			
	Other (describe)			
<b>Total \$</b>				

(list the Debts and Liabilities totals on Balance Summary in paragraph 11, line 5)

# 11. Balance Summary

12. ( The amounts below should match the totals in Worksheets A-E above.

Income and Expenses		
Worksheet	Category	Amount
A	Income	
B	Expenses	
		(subtract Line 2 from Line 1 for Total)
<b>Total \$</b>		

Assets, Investments, Trusts, Debts, and Liabilities				
Worksheet	Category	Starting Balance or Value	Gain or Loss Amount	Ending Balance or Value
C	Assets			
D	Investments and Trusts			
E	Debts and Liabilities			
		(add lines 3 and 4, subtract Line 5 for Total)		
<b>Total \$</b>				

13. I am filing this financial accounting report along with the following (forms can be found at: <https://www.utcourts.gov/howto/family/gc/reports.html>):

- All bank and account statements, tax assessments, and other supporting documentation for the reporting period,
- Notice of Right to Object, and
- Guardian and Conservator Certificate of Mailing.

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

\_\_\_\_\_  
Date

Sign here ► \_\_\_\_\_  
Typed or Printed Name \_\_\_\_\_

Name \_\_\_\_\_

Address \_\_\_\_\_

City, State, Zip \_\_\_\_\_

Phone \_\_\_\_\_

Email \_\_\_\_\_

I am: \_\_\_ Guardian \_\_\_ Guardian's Attorney, Utah Bar #: \_\_\_\_\_

**Check your email.** You will receive information and documents at this email address.

**Commented [KT1]:** Add form number, fix footer on all forms

In the District Court of Utah

Judicial District \_\_\_\_\_ County

Court Address: \_\_\_\_\_

In the Matter of:	<b>Report on Status of the Protected Person</b>
Protected Person	Case Number
	Judge

**Commented [NP2]:** We need to fix the boxes and fix the footers to make this consistent with our other forms

**Guardian contact information** (if different from above):

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

## Overview

1. The above-named protected person was born on:

\_\_\_\_\_  
Date of Birth

2. This status report covers the following period (List dates. Each report covers 365 days. The first report should start the day the guardian was appointed.):

from \_\_\_\_\_ (start date) \_\_\_\_\_ (end date)

3. Report Status (choose one):

☐

This is my first status report.

☐

This is my next status report. My previous report covered from:

\_\_\_\_\_ (start date) \_\_\_\_\_ (end date)

☐

This is my final status report (Explain. A final report is required if the guardian or conservator is no longer serving in that role, the protected person dies, the court ends the guardianship or conservatorship or the court transfers the guardianship or conservatorship to another state):

4. During the reporting period, I visited or communicated with the protected person the following number of days:

\_\_\_\_\_  
Number of days (approximate)

5. During the reporting period, the protected person engaged in the following education, training, and social activities:

6. During the reporting period, was there a need for police involvement with the protected person?

☐

No

☐ Yes (describe - list individuals involved, police agency, case #, and dates, if known)

7. There is a current plan for the protected person's care, training, and treatment (choose one):

- ☐ No
- ☐ Yes - the plan is on file with the court
- ☐ Yes - the plan is being submitted along with this report

**Commented [KT3]:** Provide link to: You can find more information about care planning here: <https://www.utcourts.gov/howto/family/gc/planning.html> (get short url)

### Living Situation

8. The protected person's current contact information is (This is only for the protected person. Do not list information for guardians or caregivers):

Street address: \_\_\_\_\_

Mailing address: \_\_\_\_\_

Phone number: \_\_\_\_\_

Email address: \_\_\_\_\_

9. The protected person's living arrangement is best described as (Choose one):

- ☐ The protected person's home.
- ☐ My home.
- ☐ Someone else's home.

(name and relationship): \_\_\_\_\_

(list phone or email): \_\_\_\_\_

☐ A care facility.

(facility name): \_\_\_\_\_

(type) . You can find information about facility types here: <https://www.utcourts.gov/howto/family/gc/planning.html>

**Commented [KT4]:** Fix spacing

[ts.gov/howto/famil  
y/qc/choosing\\_resi  
dence.html](https://www.dhs.gov/howto/family/qc/choosing_residence.html):

10. ☐ The protected person is living in a private home. Below are the other people living in the private home:

Name	Relationship to the Protected Person

11. ☐ The protected person is living in a care facility.

The following person at the facility can be contacted for further information:

Name: \_\_\_\_\_

Role / Title: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

The person responsible for paying facility costs is:

\_\_\_\_\_  
Name

To the best of my knowledge, payments to the facility are:

☐  
☐

Paid in full.

Not paid in full. The balance due is: \$ \_\_\_\_\_

12. The protected person has been at their current address since the last reporting period:

☐ Yes

☐ No - The protected person has moved because (describe):

13. I describe the protected person's living arrangement as follows:

Social:

Quality of the physical building:

Daily activities (meals, bathing):

Access to health care:

14. I think the protected person would say this about their living situation:

15. I recommend a better living situation (choose one):

☐ No.

☐ Yes (explain):

### Physical and Mental Health

16. During the reporting period, did the protected person have any significant injuries? (choose one):

☐

No.

☐

Yes (describe):

17. The protected person's primary medical care provider is:

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_

18. During the reporting period, the protected person received the following treatments and evaluations:

(List any appointments with medical, dental, and other providers. Attach additional pages if needed.)

Date	Provider Name & Phone	Purpose of Visit	Findings




19. The protected person is taking the following medications:

(List all medications. Attach additional pages if needed.)

Medication Name	Dosage	Reason

20. Describe the protected person's ability to hear, understand, and make decisions and manage their mood and emotions (use your best judgment based on what you know):

21. Describe the protected person's everyday functioning (e.g., ability to care for self, make medical decisions, make daily living decisions. Use your best judgment based on what you know):

22. During the reporting period, the protected person's mental health has (choose one):

☐ Remained about the same

☐ Improved (explain):

☐ Worsened (explain):

23. During the reporting period, the protected person's physical health has (choose one):

☐ Remained about the same

☐ Improved (explain):

☐ Worsened (explain):

24. During the reporting period, the protected person has been diagnosed with a terminal illness (choose one):

☐ No

☐ Yes, by the following physician:

Name: \_\_\_\_\_

Phone: \_\_\_\_\_

Diagnosis: \_\_\_\_\_

### Guardianship Status

25. Money I received for guardian or conservator services. (Choose one. The court must give you permission to be paid for providing guardianship or conservatorship services. Utah Code 75-5-312):

<input type="checkbox"/>	<b>None.</b> The protected person does not owe me any money.
<input type="checkbox"/>	<b>Unpaid.</b> The protected person owes me: \$ _____
<input type="checkbox"/>	<b>Partial.</b> I received: \$ _____ ; I am still owed: \$ _____
<input type="checkbox"/>	<b>Paid in Full.</b> I received: \$ _____ The protected person does not owe any additional money.

26. As guardian or conservator, I loaned money to the protected person (choose one):

<input type="checkbox"/>	<b>No.</b>
<input type="checkbox"/>	<b>Yes.</b> I loaned: \$ _____ ; I am still owed: \$ _____

27. While serving as guardian or conservator, I (choose all that apply):

<input type="checkbox"/>	<b>Did not</b> serve as a paid caregiver for the protected person.
<input type="checkbox"/>	<b>Did</b> serve as a paid caregiver for the protected person. I received: \$ _____
<input type="checkbox"/>	<b>Did</b> receive other payments, in the following amount: \$ _____

Provide a detailed explanation for payments received: (Attach supporting documents, if applicable)

---

28. I recommend that the guardianship be (choose one):

<input type="checkbox"/>	Continued as is.
<input type="checkbox"/>	Changed (describe): <div style="border: 1px solid black; height: 50px; width: 450px; margin-top: 5px;"></div>

29. I understand I am required to file this status report along with the following forms

(forms can be found at: <https://www.utcourts.gov/howto/family/gc/reports.html>):

☐ Notice of Right to Object

☐ Guardian and Conservator Certificate of Mailing

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

\_\_\_\_\_  
Date

Sign here ► \_\_\_\_\_

Typed or Printed Name \_\_\_\_\_

\_\_\_\_\_  
Name  
\_\_\_\_\_  
Address  
\_\_\_\_\_  
City, State, Zip  
\_\_\_\_\_  
Phone  
\_\_\_\_\_  
Email

**This is a private record.**

I am the ☐ Petitioner, guardian, or conservator  
☐ Respondent  
☐ Interested person (describe): \_\_\_\_\_  
☐ Attorney for the ☐ Petitioner ☐ Respondent ☐ Interested person and my Utah Bar number is \_\_\_\_\_  
☐ Representative of the following agency: \_\_\_\_\_

In the District Court of Utah

\_\_\_\_\_  
Judicial District \_\_\_\_\_ County

Court Address: \_\_\_\_\_

In the Matter of Protection for:	<b>Request to Assign a Court Visitor</b> (Utah Code of Judicial Administration 6-507)
Respondent	Case Number
	Judge

1. I request the court assign as a court visitor (select one):
- ☐ a volunteer from the Court Visitor Program.  
the following person. They are trained in law, nursing, or social work. They  
☐ have no personal interest in the proceedings. (Utah code 75-5-308).

\_\_\_\_\_  
Name

2. I ask that the court visitor investigate the following (select one):

- ☐ the respondent's ability to attend the hearing (Utah Code 75-5-303(5)(a)).
- ☐ the respondent's circumstances and wellbeing. This can include the respondent's living situation, finances, relationships, mental and physical health, and safety.
- ☐ where the guardians or conservators and respondent can be found.
- ☐ other (describe):

---

---

---

3. I ask that the court visitor do the following (Select all that apply. The court visitor will file a written report with the court after they investigate what is happening. You will receive a copy of the report.):

- ☐ interview the respondent.
- ☐ interview the guardian or conservator (before or after they are appointed).
- ☐ interview the medical professionals who examined the respondent.
- ☐ visit where the respondent is living or where the respondent might live.
- ☐ other (describe):

---

---

---

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

\_\_\_\_\_  
Date

Sign here ► \_\_\_\_\_  
Typed or Printed Name \_\_\_\_\_

### Certificate of Service

I certify that I filed with the court and am serving a copy of this Request to Assign a Court Visitor on the following people.

Person's Name	Service Method	Service Address	Service Date
	<input type="checkbox"/> Mail <input type="checkbox"/> Hand Delivery <input type="checkbox"/> E-filed <input type="checkbox"/> Email <input type="checkbox"/> Left at business (With person in charge or in receptacle for deliveries.) <input type="checkbox"/> Left at home (With person of suitable age and discretion residing there.)		
	<input type="checkbox"/> Mail <input type="checkbox"/> Hand Delivery <input type="checkbox"/> E-filed <input type="checkbox"/> Email <input type="checkbox"/> Left at business (With person in charge or in receptacle for deliveries.) <input type="checkbox"/> Left at home (With person of suitable age and discretion residing there.)		
	<input type="checkbox"/> Mail <input type="checkbox"/> Hand Delivery <input type="checkbox"/> E-filed <input type="checkbox"/> Email <input type="checkbox"/> Left at business (With person in charge or in receptacle for deliveries.) <input type="checkbox"/> Left at home (With person of suitable age and discretion residing there.)		

\_\_\_\_\_  
Date

Signature ► \_\_\_\_\_

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

In the District Court of Utah

\_\_\_\_\_ Judicial District \_\_\_\_\_ County

Court Address \_\_\_\_\_

In the Matter of Protection for

\_\_\_\_\_  
Respondent

**Order Assigning a Court Visitor**

\_\_\_\_\_  
Case Number

\_\_\_\_\_  
Judge

**The court finds that:**

1. It requires further information regarding the respondent in these proceedings.
2. \_\_\_\_\_ (name)  
Is a special appointee of the court with no personal interest in these proceedings.

**The court concludes that:**

3. Utah Code Sections 75-5-303, 75-5-308, 75-5-309, 75-5-312.5, 75-5-405, and 75-5-407 permit the court to assign a visitor to make inquiries on behalf of the court and report on those inquiries.

**The court orders that:**

4. The person named in paragraph 2 is assigned as Court Visitor in this case and will make inquiries regarding the respondent. These inquiries will relate to:

- ☐ the respondent's ability to attend the hearing (Utah Code 75-5-303(5)(a)).
- ☐ the respondent's circumstances and wellbeing. This can include the respondent's living situation, finances, relationships, mental and physical health, and safety.
- ☐ where the guardians or conservators and respondent can be found.
- ☐ other (describe):

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

5. The Court Visitor Program Coordinator \_\_\_\_\_ (name)  
may assist the Court Visitor throughout the assignment.



6. The Court Visitor may interview:
  - Respondent
  - Respondent's physician or other medical personnel that have provided or are providing treatment to the respondent
  - Guardians or Conservators (proposed or appointed)
  - Interested parties or persons
  - Other individuals interested in the welfare of the respondent
7. The person named in paragraph 2 will be able to present a copy of this order and photo identification.
8. Any person the Court Visitor contacts must cooperate with the Court Visitor and assist in gathering information. No person may unreasonably interfere with another person in their compliance with this order.
9. A Court Visitor is a representative of the court. Communication and interaction with the Court Visitor is as if made with the judge.
10. Upon request, the Court Visitor must have access to all records relating to the guardian/conservator (proposed or appointed) and the respondent, including protected health information under 45 CFR 164.512(e), financial records, and tax records from the Utah State Tax Commission.

For records classified as private under the Government Records Access and Management Act, this order is a court order pursuant to Utah Code Section 63G-2-202(7) ordering disclosure of such records.

11. The Court Visitor must not disclose the information and records provided under this order to anyone other than to the court, interested persons and others as ordered by the court.
12. The Court Visitor's interviews may not be recorded, photographed, or transmitted to other devices except by the Court Visitor or the Court Visitor Program Coordinator.
13. The Court Visitor will submit to the Court Visitor Program Coordinator a report detailing the inquiries and observations from the assignment, on or before

\_\_\_\_\_ (date)

The Court Visitor Program Coordinator will submit the report to the court on behalf of the Court Visitor, ending the Court Visitor assignment by

\_\_\_\_\_ (date)

14. All documents, recordings, and notes obtained by the Court Visitor pertaining to the investigation may be destroyed upon submission of the report.

15. Any person who fails to comply with or violates this order may be found in contempt of court, which is punishable by a fine or jail time.

Judge's signature may instead appear at the top of the first page of this document

\_\_\_\_\_  
Date

Sign here ► \_\_\_\_\_  
Typed or Printed Name

**The court's statement to the parties regarding the Court Visitor:**

A Court Visitor is a volunteer with no personal interest or connection to the case. The Court Visitor is appointed by the judge.

The Court Visitor may gather and review information, interview people, and observe people and places. The Court Visitor will finish by writing a report for the judge. The report will summarize the investigation.

The Court Visitor is important and essential to the court. They are neutral and help the court make informed decisions about guardianship and conservatorship cases.

The Court Visitor is not a party to the case. The Court Visitor is an extension of the judge and appointed by the court. The Court Visitor works under the Court Visitor Program. The statements below refer to both the Court Visitor and the Court Visitor Program as the CVP.

The CVP adheres to the following guidelines during the investigation:

- The CVP assignment ends on the date listed on the court order.
- The CVP will not take sides or represent any party in the case.
- The CVP will not participate in mediation. A Court Visitor's assignment is placed on hold if mediation is ordered.
- The CVP will not talk to the parties or their lawyers about the investigation or contents of the report.
- The CVP will not share their report with parties or their lawyers until it is finished and given to the judge.
- The CVP is not allowed to respond to requests filed with the court, including any requests that the CVP be penalized or disciplined.
- The CVP will not change reports that have been submitted.
- The CVP will not actively participate in the case after the report is submitted. The court will determine the meaning and impact of the report and what happens next.

### Certificate of Service

I certify that I served a copy of this Order Assigning a Court Visitor on the following people.

Person's Name	Method of Service	Served at this Address	Served on this Date
	<input type="checkbox"/> Mail <input type="checkbox"/> Hand Delivery <input type="checkbox"/> E-filed <input type="checkbox"/> Email (Person agreed to service by email.) <input type="checkbox"/> Left at business (With person in charge or in receptacle for deliveries.) <input type="checkbox"/> Left at home (With person of suitable age and discretion residing there.)		
	<input type="checkbox"/> Mail <input type="checkbox"/> Hand Delivery <input type="checkbox"/> E-filed <input type="checkbox"/> Email (Person agreed to service by email.) <input type="checkbox"/> Left at business (With person in charge or in receptacle for deliveries.) <input type="checkbox"/> Left at home (With person of suitable age and discretion residing there.)		
	<input type="checkbox"/> Mail <input type="checkbox"/> Hand Delivery <input type="checkbox"/> E-filed <input type="checkbox"/> Email (Person agreed to service by email.) <input type="checkbox"/> Left at business (With person in charge or in receptacle for deliveries.) <input type="checkbox"/> Left at home (With person of suitable age and discretion residing there.)		

\_\_\_\_\_  
 Date

\_\_\_\_\_  
 Signature ►

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

\_\_\_\_\_  
Name

\_\_\_\_\_  
Address

\_\_\_\_\_  
City, State, Zip

\_\_\_\_\_  
Phone

\_\_\_\_\_  
Email

**This motion requires you to respond. Please see the Notice to Responding Party.**

**Check your email.** You will receive information and documents at this email address.

I am the ☐ Petitioner, guardian, or conservator  
☐ Protected Person  
☐ Interested person (describe): \_\_\_\_\_  
☐ Attorney for the ☐ Petitioner ☐ Protected Person ☐ Interested person and my Utah  
Bar number is \_\_\_\_\_  
☐ Representative of the following agency: \_\_\_\_\_

In the District Court of Utah

\_\_\_\_\_ Judicial District \_\_\_\_\_ County

Court Address \_\_\_\_\_

In the Matter of Protection for

\_\_\_\_\_  
a protected person.

**Motion to Review or Alter a Guardianship  
or Conservatorship of an Adult**  
(Utah Code 75-5-301.5, 75-5-312, 75-5-415)

☐ **Hearing Requested**

\_\_\_\_\_  
Case Number

\_\_\_\_\_  
Judge

1. This case is for (choose all that apply):  
☐ guardianship.  
☐ conservatorship.
2. I ask the court to: (choose all that apply):  
☐ review if a guardian or conservator is still needed.

- ☐ review what powers the guardian or conservator was given.
- ☐ review how the guardian or conservator has served in their role.
- ☐ change who is serving as the guardian or conservator. I ask the court to appoint \_\_\_\_\_ (name) as the new guardian or conservator.
- ☐ add a co-guardian or co-conservator. I ask the court to appoint \_\_\_\_\_ (name) as the co-guardian or co-conservator.

3. I ask for this review because (choose all that apply):

**Protected Person**

- ☐ the protected person's functional limitations (capacity) have changed and the appointment no longer meets their needs: (explain)

---

- ☐ the protected person can make and communicate decisions with or without help.

**Concerns with Guardian or Conservator**

- ☐ there is a dispute that cannot be resolved regarding how the guardian or conservator has served in their role.
- ☐ the guardian fails to perform their duties, per Utah Code 75-5-312.
- ☐ the conservator fails to perform their duties, per Utah Code 75-7-902.
- ☐ the guardian or conservator fails to use reasonable care and diligence in managing the protected person's estate.
- ☐ the guardian or conservator was found by the court to have filed the petition for guardianship or conservatorship frivolously or in bad faith.
- ☐ the guardian or conservator obtained their appointment by fraud, deceit, or gross misrepresentation.
- ☐ the guardian or conservator is in a position to personally benefit in a way that would harm the protected person. Because of this, there is a risk they will not faithfully perform their duties.

**Change of Guardian or Conservator**

- ☐ the guardian or conservator has resigned.
- ☐ the guardian or conservator is unable to perform their duties.
- ☐ the guardian or conservator has died.
- ☐ removing or changing the guardian or conservator would be in the best interest of the protected person: (explain)

---

**Other**

- ☐ other: (explain)

---

---

4. In support of my choices in **paragraph 3** above, the court should know that:  
(Give detailed examples, such as: tasks that the protected person can do now that they couldn't do before, the guardian is stopping the protected person from making choices or spending time with friends or family, the guardian is limiting the protected person's access to their money, etc. Attach more pages if needed)

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5. ☐ I have attached the following documents in support of this motion:

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---

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6. ☐ I ask the court for a review from a health care professional to evaluate the protected person's physical condition, mental condition, or both because:  
(explain)

---

---

---

7. ☐ I ask the court to appoint a Court Visitor to investigate the items described in paragraph 4 (Code of Judicial Administration 6-507). I understand that the Court Visitor has no personal interest in the case. The court should appoint a Court Visitor because: (explain)

---

---

---

9. [ ] I ask the court to appoint a lawyer to represent the protected person because: (explain)

---

---

---

10. I am filing this motion along with the following:

- Notice of Right to Object,
- Guardian and Conservator Certificate of Mailing,
- Updated Schedule A (if you are asking to change or add a guardian or conservator).

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 \_\_\_\_\_

### Notice to responding party

You have a limited amount of time to respond to this motion. In most cases, you must file a written response with the court and provide a copy to the other party:

- within 14 days of this motion being filed, if the motion will be decided by a judge, or
- at least 14 days before the hearing, if the motion will be decided by a commissioner.

In some situations a statute or court order may specify a different deadline.

If you do not respond to this motion or attend the hearing, the person who filed the motion may get what they requested.

See the court's Motions page for more information about the motions process, deadlines and forms: [utcourts.gov/motions](https://utcourts.gov/motions)



Scan QR code to visit page

### Finding help

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### Aviso para la parte que responde

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I certify that I filed with the court and served a copy of this Motion to Review or Alter a Guardianship or Conservatorship of an Adult on the following people.

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Person's Name	Method of Service	Served at this Address	Served on this Date
	<input type="checkbox"/> Mail <input type="checkbox"/> Hand Delivery <input type="checkbox"/> E-filed <input type="checkbox"/> Email (Person agreed to service by email.) <input type="checkbox"/> Left at business (With person in charge or in receptacle for deliveries.) <input type="checkbox"/> Left at home (With person of suitable age and discretion residing there.)		
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\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature ►

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

\_\_\_\_\_  
Name

\_\_\_\_\_  
Address

\_\_\_\_\_  
City, State, Zip

\_\_\_\_\_  
Phone

\_\_\_\_\_  
Email

**This motion requires you to respond. Please see the Notice to Responding Party.**

**Check your email.** You will receive information and documents at this email address.

I am the    ☐ Petitioner, Guardian, or Conservator  
              ☐ Parent of the Minor  
              ☐ Interested Person (describe): \_\_\_\_\_  
              ☐ Minor  
              ☐ Attorney for the ☐ Guardian/Conservator    ☐ Interested Person    ☐ Parent    ☐ Minor  
                    My Utah Bar number is \_\_\_\_\_

\_\_\_\_\_  
In the District Court of Utah

\_\_\_\_\_ Judicial District \_\_\_\_\_ County

Court Address \_\_\_\_\_

\_\_\_\_\_  
In the Matter of Protection for

\_\_\_\_\_  
a Minor.

**Motion to Review or Alter a Guardianship  
or Conservatorship of a Minor**

(Utah Code §75-5-209, 75-5-212, 75-5-415.)

**☐ Hearing Requested**

\_\_\_\_\_  
Case Number

\_\_\_\_\_  
Judge

1.     This case is for: (select all that apply)

- ☐ guardianship.  
☐ conservatorship.

2.     I ask the court to: (choose all that apply)

- ☐ review the management activity of the guardian or conservator.  
☐ review the continuing need for the guardianship or conservatorship.

- ☐ review or establish parent-time or a parent visitation schedule.
- ☐ remove the guardian or conservator. I understand this does not terminate the guardianship or conservatorship. I ask the court to appoint \_\_\_\_\_ (name) as the new guardian or conservator.  
(Must file an updated Schedule A and provide notice to all interested parties.)
- ☐ add a co-guardian or co-conservator. I ask the court to appoint \_\_\_\_\_ (name) as the co-guardian or co-conservator.  
(Must file an updated Schedule A and provide notice to all interested parties.)

3. I ask for this review because (choose all that apply):

**Change of Guardian or Conservator**

- ☐ the guardian or conservator has resigned.
- ☐ the guardian or conservator is unable to perform their duties.
- ☐ the guardian or conservator has died.
- ☐ removing or changing the guardian or conservator would be in the best interest of the minor because: (explain)

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**Concerns with Guardian or Conservator**

- ☐ there is a dispute that cannot be resolved regarding the guardian or conservator's management of the appointment.
- ☐ the guardian fails to perform their duties, per Utah Code 75-5-209.
- ☐ the conservator fails to perform their duties, per Utah Code 75-5-417.
- ☐ the guardian or conservator fails to use reasonable care and diligence in managing the minor's estate.
- ☐ the guardian or conservator was found by the court to have filed the petition for guardianship or conservatorship frivolously or in bad faith.
- ☐ the guardian or conservator obtained their appointment by fraud, deceit, or gross misrepresentation.
- ☐ the guardian or conservator is in a position to personally benefit in a way that would harm the protected person. Because of this, there is a risk they will not faithfully perform their duties.

**Other**

- ☐ other: (explain)

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4. In support of my choices in paragraph 3 above, the court should know that:  
(Give detailed examples of what is happening. Attach more pages if needed).

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5. ☐ I have attached the following documents in support of this motion:

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6. ☐ I ask the court to appoint a lawyer (Guardian ad Litem or private  
Guardian ad Litem) to represent the minor because: (explain)

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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

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

### Notice to responding party

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- por lo menos 14 días antes de la audiencia, si la misma será resuelta por un comisionado.

En algunos casos debido a un estatuto o a una orden de un juez la fecha límite podrá ser distinta.

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### Cómo encontrar ayuda legal

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tiene información sobre algunas maneras de encontrar ayuda legal, incluyendo el Centro de Ayuda de los Tribunales de Utah, abogados que ofrecen descuentos u ofrecen ayuda legal limitada, y talleres legales gratuitos.



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Date \_\_\_\_\_ Signature ► \_\_\_\_\_  
 Printed Name \_\_\_\_\_

\_\_\_\_\_  
Name

\_\_\_\_\_  
Address

\_\_\_\_\_  
City, State, Zip

\_\_\_\_\_  
Phone

\_\_\_\_\_  
Email

**This motion requires you to respond. Please see the Notice to Responding Party.**

**Check your email.** You will receive information and documents at this email address.

I am the    ☐ Petitioner, guardian, or conservator  
              ☐ Protected Person  
              ☐ Interested person (describe): \_\_\_\_\_  
              ☐ Attorney for the ☐ Petitioner    ☐ Protected Person    ☐ Interested person and my Utah  
   Bar number is \_\_\_\_\_  
              ☐ Representative of the following agency: \_\_\_\_\_

\_\_\_\_\_  
In the District Court of Utah

\_\_\_\_\_ Judicial District \_\_\_\_\_ County

Court Address \_\_\_\_\_

\_\_\_\_\_  
In the Matter of Protection for

\_\_\_\_\_  
a protected person.

**Motion to Terminate a Guardianship  
or Conservatorship of an Adult**

(Utah Code §75-5-301.5, 75-5-306, 75-5-430.)

\_\_\_\_\_  
Case Number

\_\_\_\_\_  
Judge

1.     This case is for: (choose all that apply)

- ☐ guardianship.  
☐ conservatorship.

2.     I ask the court to terminate or end the guardianship or conservatorship. I ask for this because:

- ☐ the protected person no longer has functional limitations (is incapacitated).  
☐ the protected person has died.

☐ other: (explain)

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3. In support of my choices in paragraph 2 above, the court should know that:  
(give detailed examples, such as: decisions that the protected person can make and communicate now that they couldn't before and include how they make and communicate those decisions; how the protected person makes sure they have food, housing, and clothing; how the protected person manages their money, training they have received to improve their ability to make decisions in areas covered in the guardianship, etc.)

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4. ☐ I have attached the following documents in support of this motion (for example, a letter from the protected person's doctor):

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5. ☐ I ask the court to appoint a Court Visitor to investigate whether the protected person no longer has functional limitations (is incapacitated).

6. ☐ The request for termination of the guardianship or conservatorship is not due to the death of the protected person. I ask the court to appoint a lawyer to represent the protected person because: (explain)

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7. Because the guardianship or conservatorship could be terminated: (choose all that apply)

☐ I am the guardian or conservator and I have attached the final accounting for the protected person's estate.



☐ If the guardianship or conservatorship is terminated, I ask that the court enter an order transferring title of the protected person's estate to: (choose one)

☐ the protected person.

☐ the protected person's personal representative (executor).

☐ the protected person's successor in interest (beneficiaries), if there is no personal representative.

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 \_\_\_\_\_

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\_\_\_\_\_ Signature ► \_\_\_\_\_  
 Date \_\_\_\_\_  
 Printed Name \_\_\_\_\_

\_\_\_\_\_  
Name

\_\_\_\_\_  
Address

\_\_\_\_\_  
City, State, Zip

\_\_\_\_\_  
Phone

\_\_\_\_\_  
Email

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I am the    ☐ Petitioner, Guardian, or Conservator  
              ☐ Parent of the Minor  
              ☐ Interested Person (describe): \_\_\_\_\_  
              ☐ Minor  
              ☐ Attorney for the ☐ Guardian/Conservator    ☐ Interested Person    ☐ Parent    ☐ Minor  
                    My Utah Bar number is \_\_\_\_\_

\_\_\_\_\_  
In the District Court of Utah

\_\_\_\_\_ Judicial District \_\_\_\_\_ County

Court Address \_\_\_\_\_

\_\_\_\_\_  
In the Matter of Protection for

\_\_\_\_\_  
a minor.

**Motion to Terminate a Guardianship  
or Conservatorship of a Minor**  
(Utah Code §75-5-210, 75-5-212, 75-5-430.)

\_\_\_\_\_  
Case Number

\_\_\_\_\_  
Judge

1.     This case is for: (choose all that apply)

- ☐ guardianship.  
☐ conservatorship.

2.     I ask the court to terminate or end the guardianship or conservatorship. I ask for this because:

- ☐ the minor is now at least 18 years old.  
☐ the minor has died.  
☐ the minor has joined the armed forces.  
☐ the minor has been adopted.

- ☐ the minor has married.
- ☐ the minor is emancipated.
- ☐ I am the parent of a minor and I withdraw my consent for the guardianship or conservatorship.
- ☐ other: (explain)

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3. In support of my choices in paragraph 2 above, the court should know that:  
(give details to explain your choice above)

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---

---

4. ☐ I have attached the following documents in support of this motion:

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---

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5. Because the guardianship or conservatorship could be terminated: (choose all that apply)

☐ I am the guardian or conservator and I have attached the final accounting for the minor's estate.

☐ I ask that the court enter an order transferring title of minor's estate to:  
(choose one)

- ☐ the minor.
- ☐ the parents of the minor.
- ☐ the minor's personal representative (executor).
- ☐ the minor's successor in interest (beneficiaries), if there is no personal representative.

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 \_\_\_\_\_

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- at least 14 days before the hearing, if the motion will be decided by a commissioner.

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\_\_\_\_\_ Signature ► \_\_\_\_\_  
 Date \_\_\_\_\_  
 Printed Name \_\_\_\_\_



**This is a private record.**

Name \_\_\_\_\_

Address \_\_\_\_\_

City, State, Zip \_\_\_\_\_

Phone \_\_\_\_\_

Email \_\_\_\_\_

I am the ☐ Petitioner, guardian, or conservator  
☐ Protected Person  
☐ Interested person (describe): \_\_\_\_\_  
☐ Attorney for the ☐ Petitioner ☐ Protected Person ☐ Interested person and my Utah  
Bar number is \_\_\_\_\_  
☐ Representative of the following agency: \_\_\_\_\_

In the District Court of Utah

\_\_\_\_\_ Judicial District \_\_\_\_\_ County

Court Address \_\_\_\_\_

In the Matter of Protection for

\_\_\_\_\_ a protected person.

☐ a minor.

**Motion to Change Accounting Report Requirements**

(Utah Code 75-5-301.5, 75-5-312, 75-5-417.)

\_\_\_\_\_ Case Number

\_\_\_\_\_ Judge

1. The guardian or conservator was appointed on: \_\_\_\_\_ (date).

2. The current reporting requirements are every: (choose one option)

☐ 3 months. Reports are due on: (day/month) \_\_\_\_\_, \_\_\_\_\_,  
\_\_\_\_\_, and \_\_\_\_\_,

☐ 6 months. Reports are due on: (day/month) \_\_\_\_\_ and  
\_\_\_\_\_

☐ 12 months. Report is due on: (day/month) \_\_\_\_\_

☐ Other: (describe)

\_\_\_\_\_  
\_\_\_\_\_

3. I ask to change the following accounting report requirements: (choose all that apply)

☐ the reporting period. I ask that it be changed each year to:

Report beginning and ending dates: (days/months)

\_\_\_\_\_  
\_\_\_\_\_

Commented [KT1]: Fix lines below

☐ the reporting frequency. I ask that an accounting report be filed every: (choose one option)

☐ 3 months.

☐ 6 months.

☐ 12 months.

☐ Other: (describe)

\_\_\_\_\_  
\_\_\_\_\_

☐ the information required in the report. The following is required in an accounting report: (Utah Code 75-5-312(4)(a))

- all assets at the beginning and end of the reporting year;
- any income received during the year;
- any disbursements for the support of the protected person;
- any investments or trusts that are held for the protected person's benefit;
- any expenditures or fees charged to the protected person's estate; and
- any other expenses incurred by the protected person's estate.

I ask that the information required in the report be changed to: (describe)

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

4. I ask for this change because (explain):

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---

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 \_\_\_\_\_

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Person's Name	Method of Service	Served at this Address	Served on this Date
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\_\_\_\_\_  
Date

Signature ► \_\_\_\_\_

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