

RECEIVED:



- Instructions:**
- 1) A person to be appointed as a conservator of the estate may use this form to accept the appointment by the court and agree to carry out the duties of a conservator of the estate as listed below. This acceptance and agreement applies to both voluntary and involuntary conservatorships.
  - 2) In addition to the list below, the proposed conservator should review (a) C.G.S. sections 45a-644 to 45a-667v; (b) the Probate Court Rules of Procedure, rule 33; and (c) the User Guide for Conservators.
  - 3) If an individual fiduciary is not a Connecticut resident, a PC-482, Appointment of Probate Judge as Agent for Service by Non-Resident Fiduciary, must also be filed in court.
  - 4) Type or print in ink. Use an additional sheet, or PC-180, if more space is needed.

**Probate Court Name**

**District Number**

**In the Matter of**

Hereinafter referred to as the person under conservatorship

**ACCEPTANCE OF TRUST**

By signing below, I accept the appointment as conservator of the estate of the person under conservatorship.

I am not a Connecticut resident and have submitted to the court a PC-482, Appointment of Probate Judge as Agent for Service by Non-Resident Fiduciary.

**AGREEMENT OF CONSERVATOR OF THE ESTATE**

As conservator of the estate, I acknowledge the following responsibilities and agree to:

- Read and be guided by the Standards of Practice adopted by the Office of the Probate Court Administrator in carrying out my duties as conservator of the estate. I understand that the Standards of Practice are available online at [ctprobate.gov](http://ctprobate.gov) or from the court.
- Use the least restrictive means of intervention necessary to meet the needs of the person under conservatorship.
- Hold the funds owned by the person under conservatorship in a separate fiduciary (conservator) account or accounts. I understand that the person's funds may not be commingled with any other funds that the person does not own.
- Submit an inventory of the assets of the person under conservatorship in court within two months of my appointment.
- Submit a financial report or an account to the court for the first year from the date of the court decree appointing me as conservator or, with approval of the court, for the first year following the date I first received funds for the benefit of the estate of the person under conservatorship.
- Submit a financial report or periodic account every three years thereafter, or more frequently as directed by the court.
- Submit a final financial report or account when the conservatorship terminates or in the event that I resign or am removed as fiduciary.
- If it is anticipated that the person under conservatorship will become eligible for Title 19 in the next 12 months, pay, to the maximum extent possible and allowed by the court, reasonable compensation for my services and other administration expenses, including probate fees, from the assets of the person under conservatorship. An estimate of final probate fees can be calculated online at [www.ctprobate.gov](http://www.ctprobate.gov) or by calling the court.
- Send a copy of each inventory, financial report or account, and affidavit of closing at the time of filing, to each party and attorney of record.
- If a financial report or account is chosen for a random audit by the Office of the Probate Administrator, cooperate fully with the auditor.

Estate of \_\_\_\_\_

- Maintain complete records of my management of the estate, including but not limited to, all journals or ledgers, bank statements or passbooks, deposit slips, cancelled checks or check images and receipts for disbursements, as listed in the Probate Court Rules of Procedure, section 36.13. I understand that I must maintain these records until the court approves the financial report or account to which these records apply and the expiration of any applicable appeal period.
- Complete the financial report or accounting or have a professional complete the report or accounting. I understand that reasonable fees associated with the preparation may be charged to the estate.
- If the court has required a probate bond:
  - Report to the court the receipt of additional assets or income or capital gain from the sale of assets if the aggregate amount exceeds 10% of the probate bond or \$50,000, whichever is greater.
- If assets are held in a restricted account:
  - Submit proof of deposit of funds into the restricted account within 10 days of receipt of assets.
  - Seek Probate Court approval for withdrawal requests in writing and show the exact amount to be withdrawn and an explanation of the proposed use of the funds.
  - Submit verification, PC-412, Verification Re: Restricted Account, indicating that the restricted account remains in force, when filing any financial report or account.
- Immediately determine whether the person under conservatorship owns or has access to firearms, ammunition or electronic defense weapons and take immediate steps to secure them, unless the court has specifically assigned this obligation to another conservator.
- Seek Probate Court approval prior to the sale or transfer of real property or making gifts or other transfers of funds or assets belonging to the person under conservatorship, including transfers to trusts.
- Notify the court of any change of address of the person under conservatorship, my address or the address of other parties interested in the conservatorship. I will also immediately notify the court if the person under conservatorship dies.
- If requested by the court in connection with a statutory review, file a Conservator's Report, PC-371, and obtain and file a Physician's Evaluation/Conservatorship, PC-370, of the person under conservatorship.
- Continue to educate myself regarding the role and responsibilities of a conservator of the estate. I understand that there is online training for conservators available at [ctprobate.gov](http://ctprobate.gov), in which I am encouraged to enroll.
- I understand that I may be subject to a criminal background check pursuant to section 33.6 of the Probate Court Rules of Procedure.
- I understand that failure to comply with these conditions may result in a court hearing to determine whether or not I may continue as conservator.

**The representations made in this agreement are made under penalty of false statement.**

Signature		Signature	
Type or Print Name		Type or Print Name	
Date		Date	
Address		Address	
Telephone Number		Telephone Number	