



<b>TO: COURT OF PROBATE,</b>	<b>DISTRICT NO.</b>
<b>IN THE MATTER OF:</b>	<b>DATE:</b>

**AGREEMENT OF FIDUCIARY (IES)**

I/We, \_\_\_\_\_, as guardian(s) of the estate for the above-named minor, do hereby acknowledge and agree to:

- Submit an inventory of the assets of the minor in court within two months of my appointment as guardian of the estate.
- Submit a financial report or an account to the court on a form provided by the court for the first year from the date of the court decree appointing me as guardian or, with approval of the court, for the first year following the date I first received funds for the benefit of the minor's estate.
- Submit a financial report or periodic account on a form provided by the court every three years thereafter, or more frequently as directed by the court.
- Submit a final financial report or account on a form provided by the court when the minor reaches 18 years of age.
- Send a copy of the inventory of the assets of the minor and each financial report or account to each party and attorney of record.
- Maintain complete records of my management of the minor's estate, including but not limited to, all journals or ledgers, bank statements or passbooks, deposit slips, cancelled checks or check images, receipts for disbursements, etc.
- Complete the financial report or accounting or have a professional complete the report or accounting. I understand that the 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  - Seek Probate Court approval for withdrawal requests in writing and show the exact amount to be withdrawn and an explanation of the proposed use of the funds.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 that the restricted account remains in force with any financial report or account filed in court.
- Seek Probate Court approval prior to using any assets of the minor's estate for expenses to support the minor.
- Seek approval of the Probate Court prior to receiving cash in advance of scheduled payments under any structured settlement approved by the court in connection with a compromise of claim.
- Notify the court of any change of address of either the guardian(s) or the minor.
- I/We understand that failure to comply with these conditions shall result in a court hearing to determine whether or not I/we may continue as guardian(s).

**The representations contained herein are made under the penalties of false statement.**

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Fiduciary:

Date: \_\_\_\_\_

.....  
Fiduciary:

Date: \_\_\_\_\_