

**Mike Stiff**

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**From:** franklin, sandra [sandra.franklin@judicial.state.co.us]  
**Sent:** Wednesday, September 30, 2009 11:39 AM  
**To:** 'eyster@hbcboulder.com'; Mike Stiff  
**Cc:** hauber, cyndi; davis, alicia; Probate Judges; 'Aaron L. Evans'; 'Gordlaw@aol.com'  
**Subject:** Proposed change to 15-14-420

The Judicial Branch Forms Committee and the Probate Rules and Forms Committee is looking at creating a Simplified Conservator's Report. The report is intended for use in cases where assets are minimal, the financial situation is very stable (i.e., hasn't deviated from the Financial Plan for quite some time) or the court otherwise considers the "full" Conservator's Report (JDF 885) to be unnecessary. The conservator will be permitted to use this form only after first receiving court authorization. JDF 885 will continue to be the default report required in every case, unless reports are waived altogether.

15-14-420(2) states that a report must contain, among other things, a list of assets, receipts, disbursements and distributions.

In order to permit the use of a simplified report that would require only a summary statement (not a list) of the assets, receipts disbursements and distributions, I recommend the statute be amended, as follows:

2) Unless the court orders otherwise, a **A** report must:

(a) Contain a list of the assets of the estate under the conservator's control and a list of the receipts, disbursements, and distributions during the period for which the report is made;

(b) Reflect the services provided to the protected person; and

(c) State any recommended changes in the plan for the conservatorship as well as a recommendation as to the continued need for conservatorship and any recommended changes in the scope of the conservatorship.

I propose that the Statutory Revisions Committee add this change to the omnibus probate bill for this session (assuming there is one).

Please let me know if you have any questions.

*Sandie Franklin*

Probate Coordinator

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