

STATE OF WISCONSIN, CIRCUIT COURT, _____ COUNTY

IN THE MATTER OF

Name

Date of Birth

**Notice to File
Account of Guardian or
Conservator**

Case No. _____

To: [GB, GE, CN]

Address: []

GUARDIAN OF ESTATE OR CONSERVATOR

Please complete the enclosed Account of Guardian or Conservator, and file with the court by: [Due date]

To complete this account, please follow these instructions:

- The beginning balance shown on Line 1 of the **Summary Explanation** on the enclosed form is the ending balance from the previously filed Account of Guardian or Conservator unless the guardianship or conservatorship was established in the previous calendar year. If that is the case, the beginning balance is the net value of property subject to this guardianship or conservatorship as shown on the Guardianship or Conservatorship Inventory.
- On **Schedule A**, itemize all assets, income, and realized capital gains received during the period. This total should be entered on Line 2 of the Summary Explanation. Add this amount to Line 1, and enter the total on Line 3.
- On **Schedule B**, itemize all disbursements, distributions and realized capital losses during the period. This total should be entered on Line 4 of the Summary Explanation. Subtract this amount from the total on Line 3. The resulting balance should be entered on Line 5. This is the Ending Balance (Total Assets on Hand) at the end of the accounting period.
- On **Schedule C**, itemize the assets in the estate on the last day of the accounting period. The Grand Total must match Line 5 of the Summary Explanation which is the Ending Balance (Total Assets on Hand) at the end of the accounting period.
- Sign the account before a notary public.
- **NOTE:** At the time of filing this account, you are required to produce for examination by the court, evidence of all of the ward's or individual's securities, depository accounts, and other investments.

Send completed form to: [RIP address phone number]

Note: GN-3500 Account of Guardian or Conservator is also available in computer fillable format from the court website at <http://wicourts.gov>. Please complete all available fields, print the completed form and file with the court.

DISTRIBUTION:

1. Guardian or Conservator Name