

**RULE 15.11 ACCOUNTS IN PROBATE PROCEEDINGS**

(A) In any probate proceeding in which an accounting must be filed pursuant to Probate Code section 1060, including guardianship, conservatorship, and trust proceedings, the original Summary of Account as specified in Probate Code section 1061 and the original Detailed Schedules as specified in Probate Code sections 1062 and 1063 shall be filed. (See Judicial Council Forms GC-400-405.)

(B) For any accounting in a guardianship or conservatorship proceeding, the documents in support of the Summary of Account and Detailed Schedules shall be *lodged* rather than filed and shall include every “account statement”, as defined in Probate Code Section 2620(c)(1) and (2), that shows the balance of the account at the close of the preceding accounting period. As to the first accounting, the documents in support shall show the account balance immediately preceding the date the conservator or guardian was appointed. A *copy* of the Summary of Account referenced in subsection “A” shall be attached to the top of the supporting documents lodged with the court. The documents lodged pursuant to this rule shall be retained by the clerk and returned following judicial review.

(C) Time for Filing and Lodging of Documents: The Summary of Account and Detailed Schedules shall be filed and supporting documents lodged within 90 days of the close of the accounting period to which they relate.

(Amended, effective January 1, 2016)

**RULE 15.20 TERMINATION OF CONSERVATORSHIP- DEATH OF CONSERVATEE**

(A) The conservator shall notify the court within ninety (90) days of the death of the conservatee.

(B) Upon receiving notice of the death of the conservatee, if the conservatorship is one of the estate, the conservator shall file a final account of the administration pursuant to California Rules of Court, rule 7.1052.

(Adopted, July 1, 2014)